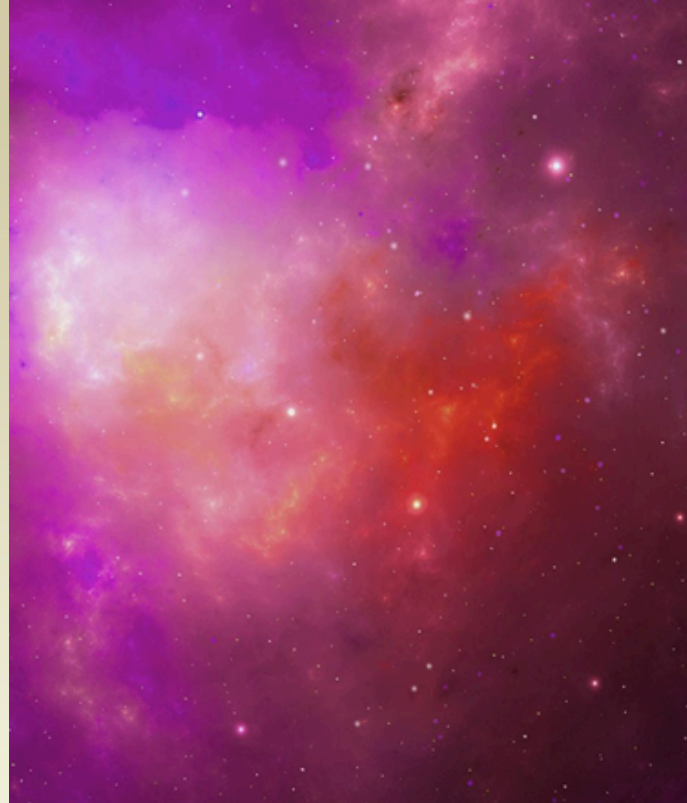


# 2024 Annual Report



EMBRACING  
INNOVATION

EMPOWERING  
PROFESSIONALS

BETA ALPHA PSI INTERNATIONAL



 @BetaAlphaPsiIntl

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 @\_BetaAlphaPsi

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# About Us

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## EMBRACING INNOVATION. EMPOWERING PROFESSIONALS.

Since 1919, Beta Alpha Psi has been a beacon of excellence in the world of financial and business education. Over the last century, our organization has grown into a global community with over 300 chapters across college and university campuses, welcoming more than 300,000 members. We proudly call ourselves an honors organization, dedicated to fostering academic excellence and professional integrity.

At our heart, we recognize and celebrate scholastic achievement. We bridge the gap between academia and business, preparing our members for the workplace through mentorship, networking, and lifelong learning opportunities.

We're committed to ethics, service, and making everyone feel like they belong. We believe in taking responsibility for our actions, both socially and environmentally.

Our goal? To shape the future of financial and business information professionals by nurturing ethical, confident leaders. We encourage the study and practice of accountancy, finance, business technology, and analytics, while fostering a sense of service and responsibility.

This report isn't just about ticking off milestones. It's about celebrating the spirit that drives Beta Alpha Psi – a spirit of excellence, integrity, and a relentless dedication to our members and the professions we serve. Together, we're building a future where knowledge shines brightly, and leadership is a badge worn with pride and purpose.

*To review the Beta Alpha Psi audited financial statements, visit [BAP.org](http://BAP.org).*

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## OUR VISION

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

## OUR MISSION

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 accounting, finance, business technology, and analytics;
- 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

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It has been my privilege to serve as President of Beta Alpha Psi during the past year. Our focus on “**Embracing Innovation and Empowering Professionals**” has led to significant strides in furthering the organization. Working in close collaboration with the Executive Office, Board of Directors, and Professional Partners, we have achieved several notable milestones.

Our most significant achievement was the establishment of a new strategic plan. This plan, which aligns with our mission and vision, serves as a crucial guide for the organization’s future. It outlines five key strategic priorities that will steer our actions:

- **Membership Experience:** We offer our members valuable experience in an inclusive environment, while they are students and after graduation.
- **Professional Engagement:** We actively partner with professionals in the financial information fields to advance the development of our members and the advancement of the organization.
- **Diversity, Equity, and Inclusion:** We strive to maintain an inclusive environment that is welcoming to all.
- **Growth and Fiscal Sustainability:** We seek opportunities to expand our organization’s chapters and membership, as well as pursue other opportunities that enhance our fiscal well-being.
- **Societal Impact:** We strive to make a positive impact on our communities, capitalizing on knowledge as financial information professionals.

This strategic plan provides a strong foundation from which the Board, staff, and members will build Beta Alpha Psi’s future. It is essential that all of us continue to work together to advance these initiatives to ensure the organization thrives in its second century.

**Mark Myring, Ph.D.**

Professor and Director  
School of Accounting  
Florida International University

Eta Iota chapter



**EMBRACING  
INNOVATION**

---

**EMPOWERING  
PROFESSIONALS**

As a team, we achieved additional notable accomplishments, including:

- **Expanding Our Reach:** We broadened our potential membership base by allowing business schools accredited by the Accreditation Council for Business Schools and Programs (ACBSP) to establish chapters. With ACBSP's 1,200 member campuses in 60 countries, this decision paves the way for meaningful growth in the impact of the organization. ACBSP is a popular accreditor for, among other great institutions, business schools at historically black colleges and universities (HBCUs) and Hispanic serving institutions (HSIs).
- **Beta Alpha Psi Meetings:** We hosted five mid-year meetings in the spring, and our annual meeting in July. In total, more than 1,900 students, faculty, and Professional Partners attended our meetings. During these meetings, our members showcased innovative ideas in Chapter Operations sessions, competed in challenges like Project Run with It (PRWI), sponsored by the Moss Adams Foundation and Best Practices, sponsored by Deloitte, and engaged in 56 professional sessions led by industry experts. KPMG, the KPMG Foundation, and Beta Alpha Psi sponsored Community Impact Day at the annual meeting.
- **Championing Diversity and Inclusion:** Our two virtual Diversity, Equity, and Inclusion events attracted over 400 participants, providing invaluable opportunities to learn and grow. We also offered our members the opportunity to enroll in the American Accounting Association's Diversity, Equity, Inclusion, and Belonging (DEIB) training at a significantly discounted price.
- **Making an Impact in Our Communities:** We made a significant and meaningful impact in our communities during the year. At the organization level, more than 800 volunteers joined together at the Beta Alpha Psi 2024 Annual Meeting for an incredible Community Impact Day, promoting literacy and supporting local Orlando-area charities. In addition, our 69 Project Run with It (PRWI) participants provided consulting services to non-profits in the Orlando area. During our mid-year meetings, we partnered with the United Way on our 'Warmth for All' Initiative. At the local level, our chapters partnered with the IRS to complete over 2,000 tax returns. In total, chapters provided over 600 hours of volunteer work to their local communities.
- **Successful Transition of BAP Operations:** I am also pleased to share that Beta Alpha Psi has successfully transitioned its operations to the American Accounting Association (AAA). This move has been instrumental in supporting our continued growth and success, and I extend our heartfelt gratitude to the AAA for their partnership, as well as to our Executive Office staff for their dedication and hard work during this transition.

None of these accomplishments would have been possible without the efforts of so many. I offer special thanks to our Past President, Kimberly Ellison-Taylor, our President-Elect, Dr. Patricia Poli, the Board of Directors, Chapter Advocates, and Professional Partners for all their hard work and support this year.

Additionally, I would like to thank our annual meeting co-chairs, McKenzie Gravitt and Dr. Jason Stanfield, for helping put together an outstanding annual meeting. Finally, I sincerely appreciate all who volunteered for Beta Alpha Psi this year, especially our faculty advisors, whose efforts too often go unrecognized.

Serving as your president has been a great honor. I am proud of what we have achieved together, and I am confident in the future of Beta Alpha Psi.

With gratitude and best wishes,



Dr. Mark Myring



# Board of Directors

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**Dr. Mark Myring**  
President



**Kimberly Ellison-Taylor,**  
**CPA/CITP, CGMA,**  
**CIA, CISA**  
Past President



**Dr. Patricia Poli, CPA**  
President-elect



**Eddie Nabors**  
Director of  
Administration



**Dr. Sridhar Sundaram, MBA**  
Dean Representative



**Dr. Teresa Conover**  
Director of Global  
Activities



**Rebecca Goessel,**  
**CPA, CGMA**  
Director of Diversity,  
Equity and Inclusion



**Danielle Bradley,**  
**MBA**  
Director At-large for  
Operational  
Sustainability



**Jeremy Carrine**  
Professional Partners  
Chair



**Leanne Lutkus**  
Professional Partners  
Chair-elect



**Riley Ramos**  
3rd-year  
Alumni Advocate



**Mangala Prasetya,**  
**MBA**  
2nd-year  
Alumni Advocate



**Rita Grant**  
3rd-year  
Chapter Advocate



**Dr. Fred Ng**  
3rd-year  
Chapter Advocate



**Dr. Jason Stanfield,**  
**CPA**  
3rd-year  
Chapter Advocate



## BOARD OF DIRECTORS - INCOMING



**Dr. Raymond Elson,**  
CPA/CITP, CGMA  
President-elect



**Bailey Maxwell,**  
SHRM-SCP  
Director of Diversity,  
Equity & Inclusion



**Kelly Rath**  
Professional Partners  
Chair-elect



**Avneet Nagra**  
3rd-year  
Chapter Advocate  
Atlantic Coast Region



**Dr. Connie McKnight,**  
CPA  
3rd-year  
Chapter Advocate  
Southwest Region



**Chad Kelsey**  
2nd-year  
Alumni Advocate

## CHAPTER ADVOCATES



**Dr. Fred Ng**  
3rd-year  
Chapter Advocate  
Oceania Region



**Dr. Jason Stanfield,**  
CPA  
3rd-year  
Chapter Advocate  
Midwest Region



**Rita Grant**  
3rd-year  
Chapter Advocate  
Rocky Mountain &  
Missouri Valley Regions



**Dr. Connie McKnight,**  
CPA  
2nd-year  
Chapter Advocate  
Southwest Region



**Avneet Nagra**  
2nd-year  
Chapter Advocate  
Atlantic Coast Region



**Dr. Amelia Hart, CPA,**  
CGMA  
1st-year  
Chapter Advocate  
Southeast Region



**Tammy Perri, CPA**  
1st-year  
Chapter Advocate  
Western & Northwest  
Regions



**Dr. Kirsten M. Rosacker,**  
CPA  
Chapter Advocate  
Rocky Mountain &  
Missouri Valley Regions

## INCOMING CHAPTER ADVOCATE

## EXECUTIVE OFFICE



**Margaret Fiorentino**  
Executive Director



**Lisa Wicker, MBA**  
Manager, Chapter  
Services



**Tricia Weston**  
Marketing Coordinator

# Professional Partners

The Professional Partners of Beta Alpha Psi are instrumental in advancing the organization's mission. These representatives demonstrate their commitment through financial support, contributing annual partner fees that play a crucial role in subsidizing both mid-year and annual meetings. Beyond their financial contributions, these dedicated professionals actively utilize their extensive networks to secure speakers and deliver presentations during these events. Many partners also go a step further by sponsoring specific competitions or awards, showcasing their ongoing dedication to the success and prosperity of Beta Alpha Psi.





## FIRMS AND INDUSTRY

- Andersen
- Aprio
- BDO USA LLP
- CBIZ and Mayer Hoffman McCann P.C. (MHM)
- Deloitte LLP
- EY LLP
- Fifth Third Bank
- Grant Thornton LLP
- KPMG LLP
- Moss Adams LLP
- MYOB
- Protiviti Inc.
- PwC
- Republic Services
- RSM US LLP
- Skillful.ly
- Wipfli LLP
- Xero
- Your Part-Time Controller, LLC (YPTC)



## STATE SOCIETIES

- Alabama Society of CPAs
- California Society of CPAs
- Indiana CPA Society
- Maryland Association of CPAs
- New Jersey Society of CPAs
- New York State Society of CPAs
- North Carolina Association of CPAs
- Texas Society of CPAs
- Washington Society of CPAs



## PROFESSIONAL EDUCATION/EXAM PROVIDERS

- Becker Professional Education
- Gleim Exam Prep
- UWorld



## ASSOCIATIONS/ NOT FOR PROFITS

- Accounting & Financial Women's Alliance (AFWA)
- AICPA & CIMA
- American Accounting Association (AAA)
- Association of Government Accountants (AGA)
- California Department of Tax and Fee Administration (CDTFA)
- Chartered Accountants of Australia and New Zealand (CAANZ)
- Educational Foundation for Women in Accounting (EFWA)
- Graduate Management Admission Council (GMAC)
- The Institute of Internal Auditors (IIA)
- Institute of Management Accountants (IMA)
- International Association for Accounting Education & Research (IAAER)
- NASBA Center for the Public Trust
- The PhD Project

# 2023-2024 Strategic Plan

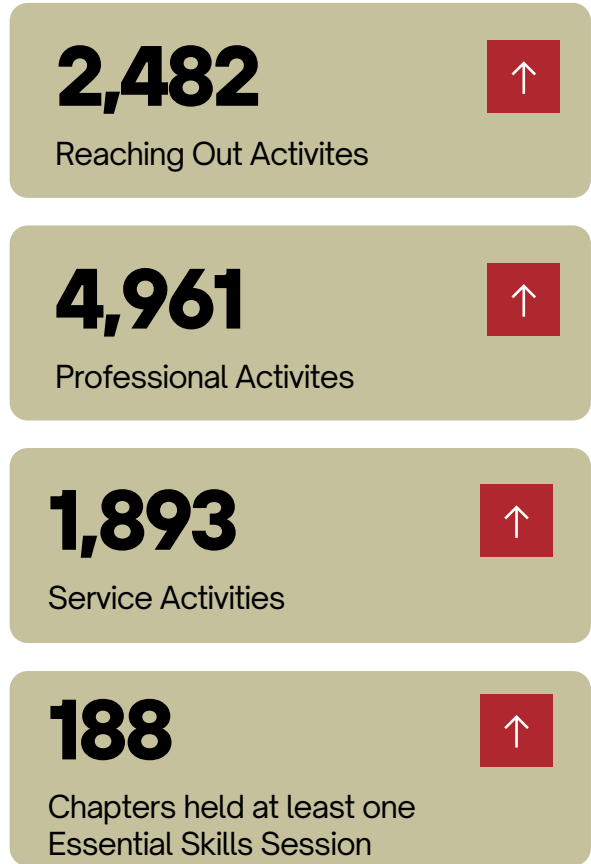
## BOARD OF DIRECTORS STRATEGIC INITIATIVES

- Membership Experience**
- Diversity, Equity and Inclusion**
- Professional Engagement**
- Growth and Fiscal Sustainability**
- Societal Impact**

## CHAPTER REPORTING

- 10 Platinum**
- 127 Gold**
- 27 Silver**
- 115 Bronze**  
*(Mission-based)*

## BETA ALPHA PSI CHAPTERS CONDUCTED:



# 2024 Mid-Year Meetings

---

FEBRUARY 9-10, 2024

## Atlanta, GA

### Co-host Chapters

- University of Tennessee at Knoxville, Alpha Lambda chapter
- University of North Georgia, Nu Gamma chapter

### Keynote Speaker

- Danielle Brannock, CPA, CSPO, Manager of Internal Audit Data Analytics at Intuitive Surgical

### Best Practice Winners

#### Empowering Community Service

- First place – Valdosta State University, Mu Zeta chapter
- Second place – University of Mississippi, Alpha Theta chapter

#### Empowering Professional Relationships

- First place – Manhattan College, Lambda Pi chapter
- Second place - University of North Carolina Wilmington, Iota Alpha chapter

#### Innovation In Your Chapter

- First place – Florida Atlantic University, Eta Tau chapter
- Second place - University of North Carolina at Charlotte, Eta Alpha chapter

FEBRUARY 16-17, 2024

## San Diego, CA

### Co-host Chapters

- University of San Diego, Zeta Kappa chapter
- Oklahoma State University, Chi chapter

### Keynote Speakers

- Blane Ruschak, President, The PhD Project
- Ken Bouyer, Director of Inclusiveness Recruiting, EY LLP Americas

### Best Practice Winners

#### Empowering Community Service

- First place – California State University, Fullerton, Delta Beta chapter
- Second place – University of Nebraska-Lincoln, Delta Omicron chapter

#### Empowering Professional Relationships

- First place – Louisiana State University, Phi chapter
- Second place – University of Arkansas, Alpha Iota chapter

#### Innovation In Your Chapter

- First place – University of Arkansas, Alpha Iota chapter
- Second place – University of Nevada - Reno, Zeta Iota chapter

FEBRUARY 23-24, 2024

## Dallas, TX

### Co-host Chapters

- University of Central Arkansas, Theta Lambda chapter
- University of California, Irvine, Nu Pi chapter

### Keynote Speaker

- Brittney Tanner, CPA, Audit Partner, South Central Business Unit Talent, KPMG LLP

### Best Practices Winners

#### Empowering Community Service

- First place – Missouri State University, Theta Pi chapter
- Second place – Utah Valley University, Mu Pi chapter

#### Empowering Professional Relationships

- First place – Missouri State University, Theta Pi chapter
- Second place – Stonehill College, Mu Omega chapter

#### Innovation In Your Chapter

- First place – California State University – Northridge, Epsilon Chi chapter
- Second place – Marist College, Lambda Eta chapter

MARCH 8-9, 2024

## Indianapolis, IN

### Co-host Chapters

- University of Massachusetts - Amherst, Delta Nu chapter
- Western Kentucky University, Eta Omicron chapter

### Keynote Speakers

- Randie G. Dial, CPA/ABV, CVA, Managing Principal, CliftonLarsenAllen LLP
- Jessie Koepplin, CPA, Director of Campus Recruiting, CliftonLarsenAllen LLP

### Best Practices Winners

#### Empowering Community Service

- First place – University at Buffalo, Zeta Theta chapter
- Second place – Western Kentucky University, Eta Omicron chapter

#### Empowering Professional Relationships

- First place – University of South Florida, Delta Gamma chapter
- Second place – University at Buffalo, Zeta Theta chapter

#### Innovation In Your Chapter

- First place – Pace University, Iota Lambda chapter
- Second place – University of South Florida, Delta Gamma chapter

SPECIAL  
THANKS

**Host Chapter Sponsor** Wipfli LLP

**Swag Sponsor** Andersen

**Breakfast Sponsor** Association of Government Accountants (AGA)

**Coffee Break Sponsors** Florida International University, Educational Foundation for Women in Accounting (EFWA), Your Part-Time Controller, LLC (YPTC), Gleim Exam Prep

**Etiquette Lunch Sponsor** Becker Professional Education

APRIL 3-5, 2024

# Auckland, NZ

## Host Chapter

- The University of Auckland, The Auckland chapter

## Keynote Speaker

- Peter Vial (FCA), Group Executive New Zealand and the Pacific, Chartered Accountants Australia and New Zealand (CAANZ)
- Richard Tims, Partner – Digital, KPMG New Zealand

## Empowering Community Service

- First place – The University of Sydney, Lambda Omega chapter
- Second place – The University of Melbourne, Xi Lambda chapter

## Empowering Professional Relationships

- First place – Monash University, Xi Epsilon chapter
- Second place – The University of Sydney, Lambda Omega chapter

## Innovation In Your Chapter

- First place – The University of Auckland, The Auckland chapter
- Second place – The University of Sydney, Lambda Omega chapter



# 2024 Annual Meeting

JULY 25-27, 2024

## Orlando, FL

<b>800</b>	Attendees	<b>8.5</b>	Eligible CPE Hours
<b>154</b>	Chapters	<b>17</b>	Professional Sessions
<b>42</b>	States	<b>27</b>	Best Practices Presentations
<b>3</b>	Countries	<b>69</b>	Project Run With It (PRWI) Student Participants
<b>3</b>	Keynote Speakers	<b>9</b>	Chapter Operations Sessions

## KEYNOTE SPEAKERS



**Richard F. Chambers, CRMA, CFE, CGAP, CIA, QIAL**  
Senior Internal Audit Advisor  
**AuditBoard**



**Dr. Kelly Richmond Pope, CPA**  
Professor  
**DePaul University**



**Avani Desai, CPA, CISSP, CISA, CIA, PMP, ISO 27001 Lead Auditor, CIPP, CCSK**  
CEO  
**Schellman**



## SPECIAL THANKS TO ALL OUR SPONSORS

### Competition Sponsors

KPMG LLP and the KPMG Foundation	Platinum Challenge Awards
Deloitte LLP	Best Practice Awards
Moss Adams Foundation	Project Run With It (PRWI)
RSM US LLP	Outstanding Faculty Advisor Awards
EY LLP	Inclusive Leadership Awards
AICPA & CIMA	Medal of Inspiration Award
AICPA Foundation	DEI Membership and Travel Awards
Dr. Eric Jack, former Dean of the Collat School of Business at the University of Alabama at Birmingham	Dean's List Awards
IRS	VITA Awards

### Sponsors and Exhibitors

Accounting and Financial Women's Alliance (AFWA)	Exhibitor
American Accounting Association (AAA)	Exhibitor
Andersen	Exhibitor
Association of Government Accountants (AGA)	Exhibitor
Aprio	Morning Refreshment Break Sponsor and Exhibitor
Becker Professional Education	Professional Headshot Sponsor Keynote Speaker Sponsor and Exhibitor
CBIZ	Exhibitor
CohnReznick	DJ and Photo Booth Sponsor and Exhibitor
Deloitte LLP	WiFi Sponsor
Educational Foundation for Women in Accounting (EFWA)	Exhibitor
Florida International University	Exhibitor
Forvis Mazars	Reception Sponsor Exhibitor
The Institute of Internal Auditors (IIA)	Exhibitor
KPMG LLP and the KPMG Foundation	Community Impact Day
NASBA Center for Public Trust	Exhibitor
North Carolina Association of CPAs	Exhibitor
University of Connecticut	Exhibitor
UWorld	Podcast Sponsor and Exhibitor
Washington University in St. Louis Olin Business School	Exhibitor
Wipfli LLP	Exhibitor
Your Part-Time Controller, LLC (YPTC)	Lanyard Sponsor and Exhibitor

# 2024 Annual Meeting Moments





# Awards, Competitions and Recognitions

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## OUTSTANDING DEAN AWARD

Dr. Chalmers is an Adjunct Professor at Swinburne University of Technology's School of Business, Law, and Entrepreneurship, and an Honorary Professor at the College of Business and Law at RMIT University.

Her exceptional support for the Xi Sigma chapter at Swinburne University have helped the chapter excel, impressing the selection committee with her dedication and impact on the academic community.

An expert in financial accounting and reporting, she has published extensively in international journals, authored research books, and contributed to leading Australian accounting textbooks. Her research focuses on accounting regulations' effects on firms' financing and investment decisions.

Dr. Chalmers, the immediate Past President of the Australian Business Deans Council and the International Association for Accounting Education and Research (IAAER), has also served as the Australian President of the Accounting and Finance Association of Australian and New Zealand. Her work on the International Accounting Education Standards Board and its successor, the International Panel on Accountancy Education, has been instrumental in shaping global accounting education standards.

She is a Fellow of CPA Australia, a Senior Fellow of FinSIA, and a member of the Chartered Accountants of Australia and New Zealand. Her influence extends to advisory boards and expert opinions on accounting matters, establishing her as a prominent figure in accounting and education forums.

**Dean Keryn Chalmers, Ph.D.**

Adjunct Professor at Swinburne University of Technology's School of Business, Law, and Entrepreneurship

Nominated by the Xi Sigma chapter, Swinburne University of Technology



*"I am honored to be the recipient of this award and grateful to the students for the nomination. My commitment to BAP chapters is due to my firm belief that a business school is a more energized and dynamic school because of BAP. It provides meaningful avenues to professionally and personally develop the next generation of business leaders attuned to societal challenges. Interacting with such talented learners and seeing the world through their lens is also a learning experience for me. Investing in BAP chapters and students is impactful and one that we can all be proud of."*

Dean Keryn Chalmers, Ph.D.

## BUSINESS INFORMATION PROFESSIONAL OF THE YEAR (BIPOY) EDUCATION

It is with great honor that Beta Alpha Psi annually bestows the Business Information Professional of the Year (BIPOY) awards. This prestigious accolade recognizes outstanding professionals in the areas of education, industry & government, and professional services. Beta Alpha Psi chapters provide the nominations for this award to honor their own outstanding alumni members or honorary members.

A 2006 graduate of Salisbury University, Mike Petry began his career in the Baltimore office of KPMG LLP's audit practice, where he rose to partner in 2019. He completed a three-year rotation into KPMG's National Office and currently serves as the co-lead of the Maryland/Virginia life science practice, where he is responsible for the development of growth strategy and overseeing the execution of client services across audit, tax and advisory service lines. His experience includes financial statement audits, accounting and internal control advisory projects. He is a frequent speaker to early-stage companies on accounting, operational, raising capital and SEC registration issues. He serves as the lead recruiting partner for Salisbury University as well as a National Instructor at KPMG LLP.

As a proud alumnus of Salisbury University, Mike gives back to the business school through his roles on the Accounting Advisory Board, the former chairman of Career Advisory Board and current member of the Executive Advisory Council. Through these roles, he provides guidance on strategic initiatives to enhance the student experience and preparedness for post-graduation. Additionally, he serves as treasurer of MENTOR Maryland | DC, an organization focused on improving mentoring relationships for young people in the community. Furthermore, he actively participates in non-profit finance committees, coaches multiple of his sons' sports teams, and serves as the Committee Chair for his sons' Cub Scout Pack.

### Michael Petry

Audit Partner  
KPMG LLP

Nominated by the Iota Pi chapter,  
Salisbury University



*"It's an incredible honor to be the recipient of the Business Information Professional of the Year in Education. I appreciate the nomination by the Iota Pi Chapter at Salisbury University led by Dr. Dave Emerson for their recognition of my efforts to support and uplift the students and the program. Beta Alpha Psi and the Salisbury University accounting program taught me the value of giving back to your community. Mentoring has always been a passion project, as I was the recipient of great mentors growing up and look to pass on the tradition and inspire a new generation of leaders through my efforts"*

Michael Petry

## BUSINESS INFORMATION PROFESSIONAL OF THE YEAR (BIPOY) INDUSTRY & GOVERNMENT

Andy Gingerich is an alumnus of University of Tulsa, graduating with a B.S. in Management Information Systems (MIS). He then received an M.S. in MIS from Oklahoma State University. Andy also completed the American Bankers Association Stonier Graduate Banking program at University of Pennsylvania and Wharton. After graduating from the University of Tulsa, Andy worked at Sabre, Inc. and EDS as a database administrator. From there, he joined BOK Financial in 2006 and became a Director in IT and is currently the Director of Enterprise Financial Systems in the Finance division. In this current role, Andy focuses on advancing the technology and strategy of the Finance, Accounting, and Capital Markets teams by instilling a culture of collaboration and tenacity. This includes supporting general ledger, budgeting and planning, funds transfer pricing, regulatory reporting and many other accounting processes.

For over 15 years, Andy has been a guest lecturer at the Collins College of Business (CCB) in a variety of MIS classes and iTU Club opportunities. In 2023, Andy was appointed the Chair of the Executive Advisory Board of the CCB, partnering with the Dean, faculty, and fellow board members to help create a premier student experience. Andy is happily married with two daughters and resides in Tulsa, Oklahoma. He enjoys every engagement he has with TU, especially when connecting with students and faculty.

### Andy Gingerich

SVP, Director,  
Enterprise Financial Systems-  
BOK Financial

Nominated by the Eta Rho chapter,  
University of Tulsa



*"I am deeply humbled and thankful to be nominated for this prestigious award by the Eta Rho chapter of Beta Alpha Psi. I have enjoyed every interaction with business students at the University of Tulsa, whether through mentorship opportunities, classroom interactions, or in other co-curricular activities. Using my career and life experiences, both positive and negative, to help answer the difficult questions they have about technology, job interviews, and life in general is always rewarding. Though I'm always hopeful I have been able to impart some bit of wisdom, I know that I have learned something from them every single time."*

Andy Gingerich

## BUSINESS INFORMATION PROFESSIONAL OF THE YEAR (BIPOY) PROFESSIONAL SERVICES

Richard Bell, CPA, JD, is the Founder and CEO of Bell & Company, a prominent regional accounting firm. With over four decades of experience in accounting and law, Richard has earned a reputation for excellence and integrity.

Following degrees in Accounting and Law from the University of Arkansas at Little Rock, Richard began his career working for public accounting firms and as a controller. In 1981, he and his wife, Lee, founded Bell & Company. Under his leadership, the firm has thrived, serving clients in various industries.

Specializing in tax, business, and estate consulting, Richard has extensive experience in the transportation industry. He has written for trade publications, led continuing education seminars, and served as an expert witness in state and federal courts.

An adjunct professor at the University of Central Arkansas, Richard taught Business Law for Entrepreneurs and was recognized with the 2020 Lifetime Achievement Award in Accounting from Arkansas Business. He served on the Bowen Law School's Dean Advisory Board, endowed the Bell & Company Law Scholarship, and was appointed by Governor Sarah Huckabee Sanders to the Arkansas State Board of Accountancy. This year, Richard was initiated as an honorary member of Beta Alpha Psi's Theta Lambda chapter.

Richard has been a guest speaker, course instructor, an endowed scholarship donor, and has hired many University of Central Arkansas (UCA) students as interns and full-time staff. His ongoing support has been instrumental to the UCA Accounting program and Beta Alpha Psi chapter.

Richard and Lee have two grandchildren, Luna and Marlee. His leadership continues to guide Bell & Company as a chief mentor and CEO with passion and dedication, ensuring the firm remains at the forefront of the accounting industry following his future retirement.

### Richard L. Bell, CPA, JD

President and CEO  
Bell & Company, P.A.

Nominated by the Theta Lambda chapter,  
University of Central Arkansas



*"I am honored to receive the 2024 Business Information Professional of the Year award in Professional Services. I thank Beta Alpha Psi International for this recognition and the Theta Lambda chapter of Beta Alpha Psi at the University of Central Arkansas for the nomination. This award reflects the dedication of our team at Bell & Company. We are proud to support future leaders and share this achievement with our community. Thank you to Beta Alpha Psi for their commitment to excellence"*

Richard L. Bell, CPA, JD

## MEDAL OF INSPIRATION

SPONSORED BY AICPA & CIMA SINCE 2008

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

My name is Bianca Perdomo. I am a junior at California State University in Fresno, majoring in Business Administration and specializing in Accountancy. My journey has been marked by overcoming significant adversity, which has shaped me into a determined and resilient individual.

My academic journey began in community college, where I maintained a 4.0 GPA, joined Phi Theta Kappa, and was honored with the Beta Phi Lambda Service Award. I was also named Student of the Year. These achievements left me wanting more and led me to apply to California State University, Fresno. I was accepted and selected as one of thirteen students in the prestigious Craig Business Scholar Program. This was when I realized that I had succeeded; everything I had experienced prepared me for my college journey.

At Fresno State, I joined Beta Alpha Psi, which enhanced my college experience and introduced me to my best friends. Beta Alpha Psi also helped me land my dream internship with Moss Adams. This year, I will serve as the recording secretary for Beta Alpha Psi and the president of the Craig Business Scholars Program.

Choosing to overcome my challenges and returning to school have been the best decisions of my life. Each milestone I've reached has enabled me to become a better mother to my four children, a leader in my community, and an inspiration to many who know my story.

Today, I live with compassion, purpose, and determination. My life now stands as a testament to self-discipline, bravery, and optimism.

**Bianca Perdomo**

California State University, Fresno

Gamma Omicron chapter



*The recognition for the Medal of Inspiration has validated my journey thus far. I now know where I am meant to be, and I am happy to say this is only the beginning.”*

Bianca Perdomo



## PRESIDENT'S AWARD

The President's Award is one of Beta Alpha Psi's highest honors, recognizing exceptional contributions to the organization and the accounting and finance professions. This prestigious award is given to individuals who have shown outstanding leadership, commitment to Beta Alpha Psi's mission, and a lasting impact on the community and profession.

Dr. Jason Stanfield, "Dr. Stan," is an Associate Professor of Accounting at Ball State. He has served as faculty advisor for the Zeta Omega chapter of Beta Alpha Psi at Ball State and the Zeta Alpha Chapter at Purdue University and is now beginning a second term as Chapter Advocate for the Midwest Region.

Dr. Stanfield earned his Bachelor of Science in Accounting from Purdue University, an MBA from Ball State University, and a PhD from Purdue. His research spans taxation, auditing, and accounting education, with publications in prestigious journals including *Auditing: A Journal of Theory and Practice*, *Journal of Accountancy*, and *The Accounting Review*. His current work focuses on bridging the gap between theory and practice, offering valuable insights that benefit both academia and the accounting profession.

In the classroom, Dr. Stanfield is known for his engaging teaching style and commitment to student success, earning him multiple awards and recognition from both students and peers. He also served as the Program Chair for the 2024 Beta Alpha Psi Annual Meeting. Notably, Dr. Stanfield was awarded the Grant Thornton Outstanding Faculty Advisor award in 2020.

Dr. Stanfield volunteers with nonprofit organizations, providing financial literacy education and accounting expertise, reflecting Beta Alpha Psi values while making a meaningful impact on the community. His contributions to education and service continue to inspire future generations of accounting professionals.

### Jason Stanfield, Ph.D., CPA

Associate Professor of Accounting  
Miller College of Business  
Ball State University

Zeta Omega chapter



*I am deeply appreciative of this recognition and sincerely enjoyed working with Mark Myring, McKenzie Gravitt, and everyone involved with the 2024 Annual Meeting as the meeting's Program Chair, and my service as a member of the Board of Directors for 2023-2024. I am incredibly excited about the future of the organization and know that the important work started this past year will continue to make Beta Alpha Psi the premier place for accounting and other financial information professionals."*

Jason Stanfield, Ph.D., CPA

## OUTSTANDING FACULTY ADVISOR AWARD

SPONSORED BY RSM LLP SINCE 2007

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 Beta Alpha Psi students.

Aileen Lowry Farrelly, CPA, MS, serves as the Assistant Dean for Career Development at the O'Malley School of Business, Manhattan College, where she is also a visiting instructor in Accounting. Aileen graduated magna cum laude from Manhattan College in 1995 and began her career at Price Waterhouse, advancing from intern to manager in the audit department. After leaving PwC in 2002 to focus on her family, she earned her Master's in Accounting from Queens College in 2009.

In 2011, Aileen returned to her alma mater as a faculty member and Internship Coordinator. By 2012, she was promoted to Assistant Dean, where she guides students' career development. A dedicated educator, Aileen also serves as the Faculty Advisor for the Lambda Pi chapter of Beta Alpha Psi.

Aileen is an active member and board member of the Manhattan College Alumni Society, reflecting her deep commitment to the college community. She oversees the Business Passport Program, a professional development initiative enhancing career readiness.

Her teaching portfolio includes Principles of Accounting I and II, Information Technology Assurance and Audit, and MBA Internship courses. Aileen has contributed to academic literature, co-authoring articles on accounting education and financial literacy.

Aileen and her husband John have four children. She remains a pivotal figure in both her professional field and the academic community, fostering an environment of growth and excellence.

## Aileen Lowry Farrelly, CPA, MS

Assistant Dean for Career Development  
O'Malley School of Business  
Manhattan College

Nominated by the Lambda Pi chapter



*Thank you, Beta Alpha Psi, and RSM LLP for the Outstanding Faculty Award. Our Beta Alpha Psi Chapter is a community that supports each other, the Manhattan College and Bronx Community in everything we do. It has been a privilege to work with and advise the students in this community for the last 13 years at Manhattan College. This chapter and I would not be who we are without the constant support and guidance of Dr. Ahmed Goma. I would like to thank Dr. Goma, my family and all the students and alumni of the Lambda Pi Chapter at Manhattan College who I am honored to work with and consider family."*

Aileen Lowry Farrelly, CPA, MS

## OUTSTANDING FACULTY ADVISOR AWARD

SPONSORED BY RSM LLP SINCE 2007

Mark T. Judd is a Clinical Professor of Accounting at the Knauss School of Business, University of San Diego, where he also serves as the Faculty Advisor for the Zeta Kappa chapter of Beta Alpha Psi. Judd has a strong educational background, holding both a B.B.A. in Accounting and a Master's in International Business from the University of San Diego. He is a licensed Certified Public Accountant in the State of California.

Judd's primary teaching interests lie in the areas of financial and managerial accounting, where he applies his extensive professional experience to enrich his students' learning. His approach to teaching emphasizes real-world applications of accounting principles, which helps prepare his students for successful careers in the accounting profession.

In addition to his academic responsibilities, Judd has been actively involved in the professional community. He brings a wealth of practical knowledge from his experience in the industry, which includes significant roles in various accounting and financial functions. His dedication to professional excellence and education has made him a respected figure in both the academic and professional realms.

Mark Judd's commitment to his students and the broader academic community is evident through his active engagement in mentoring and advising. His contributions have not only advanced the quality of education at the Knauss School of Business but have also positively impacted the lives and careers of many aspiring accounting professionals.

### Mark T. Judd

Clinical Professor of Accounting  
Knauss School of Business  
University of San Diego

Nominated by the Zeta Kappa chapter



*Receiving the Beta Alpha Psi Outstanding Faculty Advisor Award for the second time is an unexpected honor, particularly as I near the end of my career. My association with Beta Alpha Psi began in 1999, and I've been privileged to serve as both faculty advisor and chapter advocate.*

*Beta Alpha Psi is about mentoring students and preparing them for success in the financial profession. It has been deeply rewarding to see students excel in their academic and professional lives. I also want to thank Beta Alpha Psi and RSM US LLP for their unwavering commitment not only to our students but to the faculty advisors who spend countless hours ensuring that our students succeed."*

Mark T. Judd

## OUTSTANDING FACULTY ADVISOR AWARD

SPONSORED BY RSM LLP SINCE 2007

Colby Lakas, CPA, is a highly respected member of the Auburn University faculty, serving as the Director of Recruiting and Professional Development for the School of Accountancy within the Harbert College of Business since 2012. She also holds the position of Faculty Advisor for the Epsilon Omicron chapter of Beta Alpha Psi and the Rising Accountant and Analyst Program.

Lakas earned her undergraduate and graduate degrees in accounting from Auburn University in 2004 and 2005, respectively. She began her career in Big Four public accounting, spending seven years at Deloitte in Atlanta, where she worked as an auditor, campus recruiter, and regional campus recruiting manager. She is a licensed CPA in both Georgia and Alabama.

Lakas coordinates internship, recruiting, and professional development activities for accounting majors. She teaches professional development courses, maintains the School of Accountancy blog, and produces a weekly recruiting newsletter.

Her dedication to student success is evident in her involvement in various initiatives, including the "Meet the Firms" career fair and the RISE Mentorship Program. Lakas has been instrumental in the Epsilon Omicron chapter's consistent achievement of "Superior" status, a testament to her leadership.

Lakas's contributions extend beyond her administrative duties; she is deeply involved in individual student advisement, providing personalized guidance to help students achieve their career goals. Her efforts have made a significant impact on the lives of many students, who praise her for her understanding, support, and practical advice.

Colby Lakas is married and a mother of two children. Her passion for student success and professional development continues to shape the future of many aspiring accountants at Auburn University.

### Colby Lakas, CPA

Director of Recruiting and  
Professional Development  
Harbert College of Business  
Auburn University

Nominated by the Epsilon Omicron  
chapter



*BAP has been a cornerstone of my journey since 2003 when, I joined the Epsilon Omicron chapter that I now have the honor of advising. The friendships and professional relationships I've made are invaluable! With 20+ years of experience, I emphasize the critical role of professional development and networking to our students at Auburn University. Our chapter is dedicated to enhancing our members' business acumen and I'm fortunate to work with amazing students and employers!*

*Thank you to my chapter's officers for nominating me, and BAP/RSM for the 2024 Outstanding Faculty Advisor Award! We aren't in our roles for recognition, but being recognized is a great feeling."*

Colby Lakas, CPA

## OUTSTANDING FACULTY ADVISOR AWARD

SPONSORED BY RSM LLP SINCE 2007

Dr. Jason Porter, honored posthumously with the Beta Alpha Psi Outstanding Faculty Advisor Award, was a scholarly associate professor at Washington State University's Carson College of Business and the Chapter Advisor for the Delta Epsilon chapter.

Jason was born in Provo, Utah, and began his academic journey at Snow College, where he earned his associate degree. Following his mission service for the Church of Jesus Christ of Latter-Day Saints, he completed his bachelor's and master's degrees at Brigham Young University. In 2006, Jason earned his Ph.D. from the University of Georgia and embarked on a career dedicated to teaching and scholarly pursuits.

Jason's teaching career spanned the University of Idaho, University of South Dakota, and Washington State University, making significant contributions to accounting education. He was known for his expertise in financial and cost accounting, and accounting theory, and his innovative courses for non-accounting students.

Jason's impact extended beyond the classroom through his prolific writing. He authored numerous accounting textbooks, research publications, and instructional materials, demonstrating his dedication to advancing knowledge in his field. His commitment to excellence in teaching earned him accolades, including WSU's Global Campus Excellence in Online Teaching Award and the Belbas-Larson Award from the University of South Dakota.

Outside academia, Jason cherished time with his family and nurtured passions for cooking and chocolate-making, skills he inherited from his grandmother. His legacy as a teacher, scholar, and mentor continues to inspire colleagues, students, and professionals alike.

Dr. Jason Porter's profound influence and unwavering dedication to accounting education and student mentorship leave an enduring mark on the Carson College of Business and the Beta Alpha Psi community.

### Jason Porter, Ph.D.

Scholarly Associate Professor  
Washington State University

Nominated posthumously by the  
Delta Epsilon chapter



*Jason was a devoted educator and Beta Alpha Psi advisor. He engendered trust with students in a way that few can, which allowed them to build long-term relationships with Jason even though they were only in his class for a semester. Jason maintained those relationships even after the students moved into their careers. He is dearly missed by his students and colleagues. The Delta Epsilon chapter is privileged to accept this posthumous award honoring Jason's contributions.*

Dr. Richard Barnes  
Associate Professor  
Carson College of Business  
Washington State University

## LIFETIME SERVICE AWARD

The Beta Alpha Psi KPMG/Bernard J. Milano Lifetime Service Award recognizes individuals who have shown extraordinary commitment and long-term dedication to advancing the organization's mission. Recipients have made significant contributions to developing future accounting, finance, and business professionals, serving as mentors, leaders, and advocates for Beta Alpha Psi's values and goals.

Dr. Brian McGuire is the Associate Dean, Director of Accounting Programs, and Professor of Accounting at the University of Southern Indiana's Romain College of Business. He has received numerous awards for teaching, research, and service.

Dr. McGuire has held leadership roles such as President of the Board of Trustees for the Institute of Certified Management Accountants (ICMA), Chair of the Board for the Institute of Management Accountants (IMA), and Director of Administration and Development for Beta Alpha Psi (BAP). He serves on the Board of Directors for IMA and is involved with the Accounting Accreditation Committee for AACSB International.

Dr. McGuire is a member of the International Accounting Education Standards Board (IAESB) and chairs its Task Force for the Baseline Study on International Education Standards Usage. He is widely regarded as an inspiring leader, known for his passion, dedication, and unwavering commitment to advancing the accounting profession.

An accomplished speaker and author, Dr. McGuire has delivered over 150 presentations and published over 100 works. He is also active in community service, including roles with the Evansville Philharmonic Orchestra and the Buffalo Trace Council of the Boy Scouts of America.

Dr. McGuire holds a BS and MBA from the University of South Alabama and a Ph.D. from the University of Central Florida. He is a CPA, CMA, CBM, and CITP with experience in public and corporate accounting.

**Brian L. McGuire, Ph.D., CMA,  
CPA, CBM, CITP**

Associate Dean  
Romain College of Business  
University of Southern Indiana

Nominated by the Lambda Mu chapter



*"It has truly been an honor to be associated with Beta Alpha Psi for the past few decades. I have personally witnessed how BAP has impacted our members by developing their leadership skills, ethical awareness, and professional confidence. When they enter their chosen profession, our members are much more successful and have a profound influence on society, which will positively influence the future of business. Being a member of BAP has been an important part of my life, and I am very appreciative of this award."*

Brian L. McGuire, Ph.D., CMA, CPA,  
CBM, CITP

## DEAN'S LIST AWARD WINNERS

Beta Alpha Psi students who qualified for their school's dean's list (or equivalent) and whose chapters could not fund travel to attend the 2024 Annual Meeting could receive a travel stipend from Beta Alpha Psi.

Dr. Eric Jack, former Dean of the Collat School of Business at the University of Alabama at Birmingham, awarded \$2,500 to enable these two students to attend the annual meeting.

### **Martin Garcia**

The University of Texas  
Rio Grande Valley

Xi Phi Chapter



### **Lexie Lingle**

Southern Illinois University  
Carbondale

Gamma Zeta Chapter



## BEST PRACTICES



### Sponsored by Deloitte LLP since 2001

The Best Practices topics give members a chance to present their expertise on one of the topics for the year. The Best Practices topics for 2024 included Empowering Professional Relationships, Empowering Community Service, and Innovation in Your Chapter. Each of the winning teams from the five mid-year meetings competed for their winning topic. All mid-year first and second-place teams were invited to present in person at the 2024 Annual Meeting in Orlando, Florida.

#### Empowering Community Service

1st Place	University of Nebraska-Lincoln, Delta Omicron chapter
2nd Place	California State University, Fullerton, Delta Beta chapter
3rd Place	Utah Valley University, Mu Pi chapter

#### Empowering Professional Relationships

1st Place	Louisiana State University, Phi chapter
2nd Place	Monash University, Xi Epsilon chapter
3rd Place	University of Arkansas, Alpha Iota chapter

#### Innovation in Your Chapter

1st Place	Florida Atlantic University, Eta Tau chapter
2nd Place	The University of Sydney, Lambda Omega chapter
3rd Place	University of South Florida, Delta Gamma chapter



## INCLUSIVE LEADERSHIP AWARD



### Sponsored by EY since 2007

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 teaming is the diversity of team members of different backgrounds and perspectives. Highly effective leaders have experience in leading diverse teams.

EY LLP 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. EY LLP also believes that when differences are celebrated, talented people from all backgrounds have the chance to develop, advance and make more meaningful contributions to our clients and our culture.

Through the EY Inclusive Leadership award, we asked Beta Alpha Psi members — are you ready to help us build a better working world by leveraging the power of diverse perspectives?

### Final Round Winners

First Place	Swinburne University of Technology, Xi Sigma chapter
Second Place	University of Nevada - Las Vegas, Theta Omicron chapter
Third Place	Monash University, Xi Epsilon chapter
Third Place	University of Massachusetts – Amherst, Delta Nu chapter
Third Place	The University of Melbourne, Xi Lambda chapter

## PLATINUM CHALLENGE



### Sponsored by KPMG LLP and the KPMG Foundation since 2009

Beta Alpha Psi recognizes that many chapters often go above and beyond what is required to become a top performing chapter. To reward these chapters, the KPMG Foundation sponsors the KPMG Gold Challenge Competition which was renamed in 2023-2024 to the Platinum Challenge. The competition lets students put their multimedia skills to use by creating a 5-minute video that explains and/or demonstrates why their chapter deserves the award or why a top student would want to become part of Beta Alpha Psi.

The Platinum Chapter status is the highest award level a chapter can receive. Only a limited number of chapters can be awarded the Platinum 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. Each Platinum Challenge winner receives a plaque and a \$3,000 monetary award, sponsored by the KPMG Foundation. Gold chapters receive a \$500 monetary award, also sponsored by the KPMG Foundation.

### Platinum Chapters

Boise State University, Zeta Psi chapter

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Missouri State University, Theta Pi chapter

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Monash University, Xi Epsilon chapter

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Salisbury University, Iota Pi chapter

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The University of Sydney, Lambda Omega chapter

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University at Buffalo, Zeta Theta chapter

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University of Central Florida, Epsilon Gamma chapter

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University of Nevada Las Vegas, Theta Omicron chapter

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University of South Florida, Delta Gamma chapter

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Utah State University, Delta Omega chapter

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## Gold Chapters

School	Chapter	School	Chapter
Appalachian State University	Epsilon Kappa	Hofstra University	Delta Pi
Auburn University	Epsilon Omicron	Idaho State University	Eta Lambda
Auburn University at Montgomery	Xi Gamma	Iowa State University	Iota Beta
Ball State University	Zeta Omega	Ithaca College	Mu Alpha
Bentley University	Theta Gamma	Jacksonville State University	Nu Phi
Bowling Green State University	Alpha Upsilon	Kennesaw State University	Iota Tau
Bradley University	Zeta Lambda	Kent State University	Beta Psi
Brigham Young University	Gamma Alpha	Lamar University	Zeta Tau
California State University - Long Beach	Gamma Omega	Louisiana State University	Phi
California State University - Northridge	Epsilon Chi	Louisiana Tech University	Alpha Chi
California State University, Fresno	Gamma Omicron	Loyola University Maryland	Eta Upsilon
California State University, Fullerton	Delta Beta	Manhattan College	Lambda Pi
Case Western Reserve University	Pi	Marist College	Lambda Eta
Central Connecticut State University	Xi Omicron	Marquette University	Psi
Clemson University	Zeta Rho	Marshall University	Kappa Phi
Cleveland State University	Delta Psi	Middle Tennessee State University	Zeta Gamma
Deakin University	Xi Kappa	Minnesota State University Mankato	Nu Chi
Eastern Illinois University	Theta Omega	Murray State University	Epsilon Nu
Eastern Washington University	Delta Sigma	North Carolina A&T State University	Zeta Sigma
Elon University	Lambda Xi	North Carolina State University	Iota Omega
Fairfield University	Iota Psi	Northern Arizona University	Delta Upsilon
Fairleigh Dickinson University	Nu Sigma	Ohio Northern University	Mu Delta
Florida Atlantic University	Eta Tau	Ohio University	Alpha Kappa
Florida Gulf Coast University	Mu Lambda	Oklahoma State University	Chi
Florida International University	Eta Iota	Old Dominion University	Zeta Pi
Florida State University	Beta Rho	Oregon State University	Epsilon
Georgia Southern University	Zeta Delta	Pace University	Iota Lambda
Gonzaga University	Iota Delta	Purdue University	Zeta Alpha

## Gold Chapters

School	Chapter	School	Chapter
Quinnipiac University	Nu Alpha	University of Illinois	Alpha
Robert Morris University	Xi Delta	University of Kentucky	Alpha Mu
Rutgers University-New Brunswick	Theta Mu	University of Louisiana at Lafayette	Kappa Theta
Sam Houston State University	Kappa Mu	University of Louisiana at Monroe	Eta Sigma
San Francisco State University	Beta Chi	University of Massachusetts - Amherst	Delta Nu
San Jose State University	Gamma Xi	University of Michigan - Flint	Eta Xi
Seattle University	Delta Eta	University of Mississippi	Alpha Theta
Siena College	Nu Xi	University of Missouri - St. Louis	Gamma Psi
Southeast Missouri State University	Mu Xi	University of Nebraska - Lincoln	Delta Omicron
Southern Illinois University at Carbondale	Gamma Zeta	University of Nebraska at Omaha	Gamma Kappa
Stonehill College	Mu Omega	University of North Alabama	Xi Zeta
Stony Brook University	Omicron Alpha	University of North Carolina at Charlotte	Eta Alpha
SUNY Oswego	Lambda Zeta	University of North Carolina Greensboro	Zeta Chi
Temple University	Alpha Phi	University of North Carolina Wilmington	Iota Alpha
Texas State University	Kappa Eta	University of North Florida	Xi Eta
The University of Akron	Gamma Eta	University of North Georgia	Nu Gamma
The University of Melbourne	Xi Lambda	University of North Texas	Beta Pi
The University of Southern Mississippi	Zeta Mu	University of Oregon	Beta
The University of Tampa	Lambda Beta	University of San Diego	Zeta Kappa
The University of Texas Rio Grande Valley	Xi Phi	University of Scranton	Nu Kappa
Truman State University	Kappa Nu	University of South Carolina Upstate	Xi Alpha
University of Alabama at Birmingham	Delta Chi	University of South Dakota	Theta Upsilon
University of Arizona	Beta Omicron	University of Southern California	Iota
University of Arkansas	Alpha Iota	University of Southern Indiana	Lambda Mu
University of Central Arkansas	Theta Lambda	University of Tennessee at Chattanooga	Eta Kappa
University of Florida	Upsilon	University of Tennessee at Knoxville	Alpha Lambda
University of Hawaii - Manoa	Delta Theta	University of Texas at El Paso	Theta Beta
University of Houston	Gamma Delta	University of Texas at Tyler	Mu Kappa

## Gold Chapters

School	Chapter
University of Utah	Epsilon Xi
University of Washington	Delta
University of West Florida	Iota Phi
University of Wisconsin - Milwaukee	Eta Theta
University of Wisconsin - Whitewater	Epsilon Rho
University of Wisconsin Oshkosh	Iota Rho
Valdosta State University	Mu Zeta

School	Chapter
Virginia Commonwealth University	Epsilon Zeta
Washington State University	Delta Epsilon
Washington State University - Vancouver	Nu Theta
West Chester University	Nu Zeta
Western Illinois University	Zeta Beta
Western Kentucky University	Eta Omicron
Western Michigan University	Gamma Rho

## Silver Chapters

School	Chapter
Central Michigan University	Eta Epsilon
College of Charleston	Mu Beta
Colorado State University	Gamma Tau
Creighton University	Alpha Nu
Eastern Michigan University	Epsilon Omega
Fordham University	Alpha Omega
Fort Lewis College	Theta Nu
Illinois State University	Kappa Delta
Mississippi State University	Beta Kappa
Rowan University	Xi Theta
San Diego State University	Beta Eta
St. John's University - Staten Island	Kappa Zeta
The University of Alabama	Alpha Beta
The University of Memphis	Gamma Chi

School	Chapter
The University of New Mexico	Theta Xi
University of Georgia	Beta Upsilon
University of Idaho	Iota Gamma
University of Iowa	Alpha Pi
University of Massachusetts Dartmouth	Mu Phi
University of Nevada - Reno	Zeta Iota
University of New Orleans	Gamma Sigma
University of North Dakota	Zeta
University of Northern Colorado	Theta Psi
University of Oklahoma	Iota Nu
Washington University in St. Louis	Nu Iota
Widener University	Kappa Iota
Youngstown State University	Kappa Xi

## PROJECT RUN WITH IT (PRWI)



### Sponsored by Moss Adams Foundation since 2008

Project Run with It involved 69 Beta Alpha Psi chapter members working together during the 2024 Beta Alpha Psi Annual Meeting to develop solutions to real-life business problems of actual not-for-profit (NFP) organizations. Students worked in teams to develop a formal presentation showcasing their solution to the business issues the NFPs presented in their “request for proposal” for consulting services.

#### Salvation Army, Team SA4

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Samuel Ellis                  Swinburne University of Technology, Xi Sigma chapter

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Meg Helgesen                University of North Carolina Greensboro, Zeta Chi chapter

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Shaniyah Scott              University at Buffalo, Zeta Theta chapter

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#### Quest, Team Q3

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Matthew Buie                Appalachian State University, Epsilon Kappa chapter

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Thomas Tumbokon          University of Washington Bothell, Mu Psi chapter

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Bruno Salles                 University of Nebraska Lincoln, Delta Omicron chapter

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Madeline Seburn            Elon University, Lambda Xi chapter

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#### Coalition for the Homeless of Central Florida - Team C6

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Matthew Gonzales          University of Texas at Arlington, Gamma Phi chapter

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Tristan Hanrath             Fort Lewis College, Theta Nu chapter

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Johnny Vasquez             University of Central Arkansas, Theta Lambda chapter

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Layton Walker                University of Arkansas, Alpha Iota chapter

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## VITA AWARDS



## Sponsored by IRS

The Volunteer Income Tax Assistance (VITA) Program offers free tax help to people who make \$64,000 or less and need assistance in preparing their 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. This year, 44 participating Beta Alpha Psi chapters dedicated over 600 volunteer hours and prepared over 19,000 tax returns, making a significant impact in their communities.

### IRS VITA Superior

Highest returns prepared and/or 100%-chapter members participation

School	Chapter
California State University Northridge	Epsilon Chi
Murray State University	Epsilon Nu
Ohio Northern University	Mu Delta
SUNY Oswego	Lambda Zeta

### IRS VITA Gold

Between 500 and 999 returns prepared or 80%-89% chapter members participation

School	Chapter
California State University - Long Beach	Gamma Omega
Loyola University - Maryland	Eta Upsilon
Marshall University	Kappa Phi
Middle Tennessee State University	Zeta Gamma
Quinnipiac University	Nu Alpha
San Francisco State University	Beta Chi
University of Massachusetts – Amherst	Delta Nu
University of Southern California	Iota

### IRS VITA Silver

Between 500 and 699 returns prepared

School	Chapter
Ball State University	Zeta Omega
Brigham Young University	Gamma Alpha
Creighton University	Alpha Nu
Ithaca College	Mu Alpha
Kent State University	Beta
New Mexico State University	Delta Lambda
Prairie View A&M University	Nu Psi

School	Chapter
Rutgers University – New Brunswick	Theta Mu
Temple University	Alpha Phi
University of Louisiana at Monroe	Eta Sigma
University of Louisville	Eta Gamma
University of North Georgia	Nu Gamma
University of Utah	Epsilon Xi
Valdosta State University	Mu Zeta

# Honoring the Contributions of Our Sponsors

Competitions and awards are at the heart of the Beta Alpha Psi member experience, offering students the opportunity to develop professionally, practice ethical and social responsibility, and expand their networks. This enriching experience is made possible through the generous support, involvement, and enthusiasm of our sponsoring Professional Partners. We extend our heartfelt gratitude to the following sponsors for their invaluable contributions, which have enabled us to offer these enriching opportunities to our members.

## KPMG LLP and the KPMG Foundation

**\$93,500**

Awarded to chapters placing in the Platinum Challenge Competition and Gold status chapters

**\$50,000**

Contributed to Community Impact Day

## Moss Adams Foundation

**\$11,000**

Awarded to Project Run With It (PRWI) winning teams

**\$31,000**

Contributed to PRWI program expenses

## Deloitte LLP

**\$30,000**

Awarded to chapters placing in the Best Practices competitions

## RSM LLP

**\$20,000**

Awarded to Outstanding Faculty Award recipients

## EY LLP

**\$13,250**

Awarded to chapters placing in the Inclusive Leadership competition

## AICPA Foundation

**\$4,500**

Awarded DEI travel grants to 9 students to attend annual meeting

## AICPA & CIMA

**\$5,000**

Awarded to the Medal of Inspiration recipient

**\$2,250**

Awarded DEI membership grants to 30 students







## BETA ALPHA PSI INTERNATIONAL

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