



BETA ALPHA PSI

THE INTERNATIONAL HONOR ORGANIZATION FOR FINANCIAL INFORMATION PROFESSIONALS

SAMPLE INVITE LETTER – PLEASE EDIT ITEMS IN RED

Welcome back to campus! Congratulations on your academic performance up to now. The dedication you have shown to your coursework is evident and to be commended. Because of your achievement, we invite you to join Beta Alpha Psi, the international honorary society for financial information professionals. Members of the **Greek Name** Chapter of Beta Alpha Psi are among the great students of the **Name of Business School** at **School Name**. Our chapter has a history with alumni who are now firm partners, corporation executives, and industry leaders. **Chapter please add any relevant information here.**

Beta Alpha Psi is an extraordinary organization with campus, regional, and national resources to provide you opportunities to increase your professionalism, expand your social and professional networks, and serve your campus and community. Opportunities to be involved as a leader in the **Greek Name** chapter here at **School Name** are numerous! In addition to events on campus, student members have opportunities to travel to **Region Name** cities for mid-year and annual meetings. In recent years, the annual meeting has been held in Washington D.C., Las Vegas, and Orlando.

Beta Alpha Psi holds its candidates and members to a high standard. Candidates must have an overall GPA of a 3.0 or higher and have earned an average of 3.0 or higher in upper-level major courses. It is our sincere hope that all eligible students will join.

Please complete the attached application to join today. Once completed, return your application via email to **Chapter email** or to the Department office in **Location**. Candidate dues are **\$** . We look forward to receiving your completed application.

Need more information? Explore bap.org, visit our chapter website at **address**, see us on Instagram, and talk with members and faculty advisors. Welcome to Beta Alpha Psi!

Faculty advisor name

Faculty advisor signature



BETA ALPHA Ψ

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Beta Alpha Psi Reporting Reminders 2024 – 2025

October 15 US Chapters - \$325 chapter maintenance fee due from all chapters not in the petitioning phase. \$50 late fee if paid after October 15. **June 15 deadline** for Oceania chapters.

How do I download an invoice for the Chapter Maintenance fee? Login [here](#). Go to Beginning of Year report, Payment Options. Click the link to pay by credit card or to download an invoice and pay by check.

Candidate dues – \$75 per record payable within 60 days of the names being entered into the Reporting Intranet. \$20 late fee per record if not paid within 60 days.

Honorary and faculty dues - \$75 per record payable within 60 days of the names being entered into the Reporting Intranet. \$20 late fee per record if not paid within 60 days.

How do I download an invoice for candidate dues? Login [here](#). Go to Reporting and Membership, Generate Dues invoice. Select the names to pay by credit card or print an invoice to pay by check. If you need an invoice on Beta Alpha Psi letterhead, email bap@bapeo.org.

Mid-Year Meeting Registration - deadline (to be determined) for early registration for Mid-Year meetings is . Registration fee increases to \$ per attendee if payment is not received by our office on **TO BE DETERMINED**. Late fee is \$.

We prefer to pay award stipends via ACH. Contact bap@bapeo.org to get an invite for Bill.com. We will pay by check if necessary, but please sign up for ACH payments if possible.

How do I complete a W9 for my chapter? Download the most current W9 from the IRS website [here](#).

Line 1 should read, Beta Alpha Psi (Greek name) Chapter

Line 2 should read, Name of Your School

Use your chapter's tax id number, which may be found on the Chapter Profile page by logging in [here](#).

For Organization type, check Other, then write 501 c 3.

Write your chapter's address. Sign it, date it and send it to bap@bapeo.org.

Where do I mail payments? Send checks made **payable to Beta Alpha Psi** to the following address:

Beta Alpha Psi

9009 Town Center Parkway

Lakewood Ranch, FL 34202



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December 15 – Mid-Year report due for US award seeking, petitioning and probation chapters. Enter fall candidates and fall activities.

December 15 – End of Year report due for Oceania chapters.

April 1 – Annual meeting website launch, check back for registration deadlines.

April 30 – Beta Alpha Psi Executive Office fiscal year end. Pay candidate dues by April 30.

June 1 – End of Year reporting deadline for US chapters. Go to Reporting and Membership [here](#), End of Year report. Complete chapter reporting and file the [990n e-postcard](#) by June 1 if your average chapter receipts are \$50K or under for the last three years. Use your chapter's tax id number found on the Chapter Profile page. If you don't know where to locate this, reach out to bap@bapeo.org. File the 990n e-postcard between May 1 and June 1. Send proof of filing to bap@bapeo.org and enter the submission id number into the End of Year report. If your chapter receipts are over \$50K for the last three years, download the Over \$50K spreadsheet and complete all three tabs. Upload it as part of the End of Year report due on June 1. No exceptions, \$100 penalty for filing late. Upload financial statements, template [here](#).

June 20 - End of Year Reporting status communicated to Faculty Advisors

July 5 – Last day to appeal End of Year reporting results. Email bap@bapeo.org

How do I get a credit for a transfer student? – Email bap@bapeo.org with the student's name, former chapter and dates and we will verify attendance, then follow up with next steps.

How do I order certificates? Enter candidate records, pay the \$75 fee, move records to the Submit for Initiation folder, wait two weeks to receive in the mail. Email bap@bapeo.org to confirm if you need by a certain date or need certificates mailed to an alternate address. Certificates are sent from Award Concepts located outside Chicago, Illinois.

How do students get digital membership badges? Digital badges will be created within 15 days of names being submitted for initiation and paid. Students, please check your spam folder for an email from Credly.com to activate your digital badge. If you have not received your digital badge within 15 days of your record being submitted for initiation and paid, please email bap@bapeo.org.

How does an advisor get access to the Reporting Intranet? Email bap@bapeo.org



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How do chapter officers get access to the Reporting Intranet? Advisor creates their accounts and adds them to the Chapter Profile page, review the Reporting Intranet Guide [here](#).

What's the Alumni & Member Network? A free resource for alumni and members to connect, join [here](#)! Wait til you are a member or an alum to apply.

Where do I go for more questions? Check the Faculty Advisor Resources [here](#), then email bap@bapeo.org

PROGRAM FOR CHAPTER ACTIVITIES AT-A-GLANCE 2024-2025

CHAPTER REQUIREMENTS

Chapters must meet certain requirements depending upon the desired achievement level. The requirements include submission of reports, initiation, Reaching Out activities, professional activities, and service activities. Chapters not meeting the minimum requirements will be placed on probation for the subsequent year.

A summary of the required activities by achievement level follows:

MINIMUM ACTIVITIES REQUIRED BASED ON CHAPTER ACHIEVEMENT LEVEL

Chapter Achievement Level	Beginning of Year Report	Mid-Year Report	Initiation	End of Year Report	Reaching Out Activities	Professional Activities	Service Activities
<i>Bronze</i>	Yes	N/A	Yes	Yes	3	6	2
<i>Silver</i>	Yes	Yes	Yes	Yes	8	10*	4
<i>Gold</i>	Yes	Yes	Yes	Yes	11	12*	6

Award seeking chapters must include at least 1 mandatory "Essential Skills" session (Refer to Essential Skills topics under Professional Activities).

All chapters seeking Gold and Platinum status must attend either the Annual Meeting or a Mid-Year Meeting. To win Platinum, you must submit for the competition.

To qualify as a professional or service activity, the event must be at least 50 minutes in length and at least 20% of the chapter's active members/candidates must participate in the event.

IMPACT ACTIVITY POINTS

An Impact Activity is a Professional or Service Activity that demonstrates a strong effect has been made to your university or community. Impact activities earn an extra point toward award status (i.e., an extra professional or service point). Impact activities may include but are not limited to the following elements:

- Tutoring
- Financial Volunteer Support (donating accounting or bookkeeping services)
- Mentoring
- Media Promotion (TV or Print)
- Sharing business/college knowledge (e.g., volunteering with high school, incoming freshmen, and undeclared students)
- Community College Outreach
- AACSB Societal Impact Goal for your business school
- VITA

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REPORTING IMPACT POINTS

Utilize the drop-down function in the Reporting Intranet and complete the online form to report Impact Points. Document the number of people impacted, types of audiences, and describe the impact of the activity.

The online student can meet their service requirements via the same model, only theirs would count as “BAP-Service for Online Students”. Examples of virtual service activities include:

- Tutoring other online students in accounting, finance, business technology and analytics
- Tutoring high school students in math
- Tutoring Community College Students in accounting, finance, business technology and analytics
- Volunteering at a local food bank, animal shelter, nursing home or community center

ESSENTIAL SKILLS REQUIREMENT FOR AWARD-SEEKING CHAPTERS

Essential Skill - Mandatory Professional Activity – Award Seeking Chapters (Platinum, Gold & Silver). Award-seeking chapters are required to conduct one mandatory professional session that will include a session devoted to Essential Skills. Many students seek to obtain internships and full-time job opportunities through Beta Alpha Psi, but once they have the job, they must develop their “essential skills” to succeed professionally. Each chapter can choose one of the below topics for their Essential Skills session.

Each Essential Skill activity should be entered into the Reporting Intranet as: **ES – Topic Title.**

CHAPTER REFRESH – 2024-2025

BAP has established a BAP Chapter Refresh program to assist chapters in planning for 2024-2025. The BAP Chapter Refresh provides chapters with more Reaching Out Activities (ROAs). The Executive Office will be offering chapters resources for hybrid (live and virtual) opportunities that include the below:

Chapter Reboot Timeline

- Monthly beginning September 2024 – Chapter Reporting 101
 - A reporting event for faculty advisors and officers. In this session, you will learn the basics of chapter reporting in the BAP intranet.
- Chapter Reporting Quiz – Score 80% or better
- Fall 2024 and Spring 2025 (TBD) – Virtual Initiation Event
 - The Executive Office and Professional Partners will host this professional session and live virtual initiation for all eligible members.

Chapters must retain detailed information regarding the non-Beta Alpha Psi activities until October 1 of the following year.

OFFICER TIME: Please record officer and committee chair time as 1 service activity for fall and 1 service activity for spring.