

Reimagining

THE PATH FORWARD



BETA ALPHA PSI

2023 Annual Report



2023 BETA ALPHA PSI ANNUAL REPORT

TABLE OF CONTENTS

- 2** Vision statement, Mission statement, Executive Office staff
- 3** Letter from the President
- 5** Board of Directors
- 6** Chapter Advocates
- 7** Professional Partners
- 10** 2023 Mid-Year Meetings
- 13** 2023 Annual Meeting
- 17** Awards, Competitions and Recognitions
 - Awards:
 - Outstanding Dean
 - Business Information Professional of the Year (BIPOY)
 - Medal of Inspiration
 - President’s Awards
 - 2023 Outstanding Faculty Advisor winners
 - Competitions:
 - Best Practices
 - EY Inclusive Leadership Awards
 - Gold Challenge
 - Project Run With It
 - VITA Awards
 - Recognitions
 - Beta Alpha Psi and AICPA Foundation DEI Scholarships
 - Beta Alpha Psi and AICPA Foundation DEI Travel Grant Recipients
 - Award Chapters – Superior and Distinguished
 - Award Sponsors Recognition FY23
- 39** Annual Meeting Sponsors Recognition

To review the Beta Alpha Psi audited financial statements, visit bap.org/2023-annual-report



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, business analytics, or digital technology;
- providing opportunities for service, professional development, and interaction among members and financial professionals; and
- fostering lifelong ethical, social, and public responsibilities.

EXECUTIVE OFFICE STAFF



Margaret Fiorentino
Executive Director



Lisa Wicker
Manager, Chapter Services



Katherine Hackett
Communications & Marketing

LETTER FROM THE PRESIDENT



REIMAGINING THE PATH FORWARD

In this time of disruption and change, it is also a time of opportunity. The opportunity to Reimagine the Path Forward is what the Beta Alpha Psi Board of Directors and Executive Office focused on this past year.

We reimagined our strategic planning process to include more input from our students, faculty and Professional Partners. We reimagined the annual meeting by including an etiquette lunch, fashion show; and an attendee reception that included line dancing.

On behalf of Beta Alpha Psi, thank you to each of our Professional Partners for their generous contributions financially and for providing quality professional sessions for both our Mid-Year meetings and Annual meeting. By sponsoring competitions, community impact event, contributing a recorded sessions and attending a mid-year and/or annual meetings, each of you made a difference in a student's life. Our gratitude is infinite.

Thank you to Anthony Pugliese, President and CEO of the Institute of Internal Auditors; Simon T. Bailey, who inspires us all to never stop learning; Dorri McWhorter, CEO and President of the YMCA of Metropolitan Chicago; Colleen Conrad, COO of NASBA; and finally, Jessica Sayles, Managing Principal, Houldsworth, Russo & Co., P.C., Certified Public Accountants. I also appreciate Karen Lynch's message of encouragement and support of the Accounting Profession as well as messages in support of Beta Alpha Psi and the annual meeting from AICPA-CIMA's Chairman Okorie Ramsey and President and CEO Barry Melancon. Further, we added a professionals and alumni track that included 14 hours of Continuing Professional Education (CPE) credit hours.

I will always be deeply grateful to Danielle Bradley and Valerie Wendt for all their hard work making the 2023 annual meeting a professional and entertaining event for our students. Thank you also to the AICPA team for their support with registration, exhibitors and sponsors. Our conference would not have been the same without the exhibitors and sponsors who added tremendous value and helped us make the annual meeting an educational and memorable experience.

I would also like to thank McKenzie Gravitt for taking on the task of reimagining Beta Alpha Psi's social media branding. Through her efforts, Beta Alpha Psi's social media presence and engagement increased 30%!

Beta Alpha Psi is truly blessed with the amazing volunteers who contribute their time, experience, knowledge, and financial support. Special recognition is given to each of the chapters who presented — whether in Chapter Operations, Project Run With It or Best Practices. To get to the annual meeting is a great accomplishment, and I am beyond proud of you. Congratulations to all the awardees. Your recognition highlights your dedication and is an inspiration for us all.

On behalf of Beta Alpha Psi, thank you to each of our Professional Partners for their generous contributions of quality professional sessions for our Mid-Year and Annual meetings. By sponsoring a competition, community impact event, contributing a recorded session and attending a mid-year and/or annual meeting, each of you made a difference in a student's life. Our gratitude is infinite.

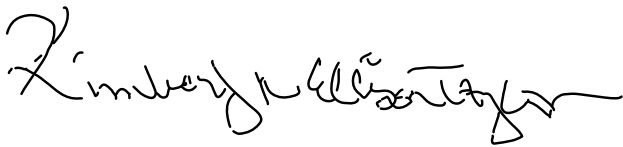
Further, we reimagined our state society partnerships to provide more access to our students through targeted marketing communications so that students will better understand the importance of professional memberships and certifications. There is tremendous opportunity for Beta Alpha Psi and I look forward to continuing to support the organization as immediate past president.

Thank you to the Board of Directors, Chapter Advocates, Executive Office staff and all those who supported our new strategic initiatives and making them a reality. Best wishes to the outgoing board members and congratulations to the new members of the board, particularly Mark Myring as the 2023–2024 Beta Alpha Psi President.

Finally, thank you to our future bosses for helping us to reimagine how we can better serve you, the students! Thank you for inviting me to your schools and making me feel welcome and inspired.

It was an honor to serve.

Sincerely,

A handwritten signature in black ink that reads "Kimberly Ellison-Taylor". The signature is fluid and cursive, with a large initial "K" and a long, sweeping underline.

Kimberly Ellison-Taylor, CPA/CITP, CGMA, CIA, CISA
2022–2023 President, Beta Alpha Psi

BOARD OF DIRECTORS – CURRENT



Kimberly Ellison-Taylor
President



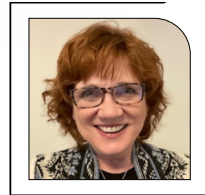
Dr. Mark Myring
President-elect



Scott McQuillan
Past President



Dr. Sridhar Sundaram
Dean Representative



Dr. Jan Taylor
AICPA Liaison



Dr. Teresa Conover
Director of
Global Activities



Dr. Raymond Elson
Director of
Administration



Danielle Bradley
At-Large Director
for Operational
Sustainability



Rebecca Goessel
At-Large Director
of Diversity, Equity
& Inclusion



Jodi Ryan
Professional
Partner Chair



Jeremy Carrine
Professional Partner
Chair-elect



Riley Ramos
International Alumni
Representative



Mangala Prasestia
International Alumni
Representative

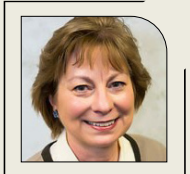


Dr. Lisa Owens-Jackson
3rd Year Chapter
Advocate



Mark Judd
3rd Year Chapter
Advocate

BOARD OF DIRECTORS – INCOMING



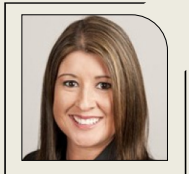
Dr. Patricia Poli
President-elect



Eddie Nabors
Director of
Administration



Rita Grant
3rd Year Chapter
Advocate



Leanne Lutkus
Professional Partners
Chair-elect



Dr. Fred Ng
3rd Year Chapter
Advocate



Dr. Jason Stanfield
3rd Year Chapter
Advocate

UPDATES FOR THE YEAR:

- ▶ Revised the Program for Chapter Activities to move from hours to impact of activities
- ▶ Addition of Impact Points for Chapters to help chapters achieve award status
- ▶ 2023 Mid-Year Meetings were all held in-person
- ▶ Increased our social media presence by 30%
- ▶ Provided award status and welcome-back graphics to chapters to share in their social channels
- ▶ Held two Diversity, Equity & Inclusion virtual events (Fall 2022 & Spring 2023)
- ▶ Held two Virtual Initiations (Fall 2022 and Spring 2023)

CHAPTER ADVOCATES – CURRENT

• 3rd Year



Dr. Lisa Owens-Jackson
Southeast Region



Mark Judd
Western & Northwest Regions



Rita Grant
Rocky Mountain & Missouri Valley Regions



Dr. Jason Stanfield
Midwest Region



Dr. Fred Ng
Oceania Regions

• 1st Year



Dr. Connie McKnight
Southwest Region



Avneet Nagra
Atlantic Coast Region

INCOMING CHAPTER ADVOCATES



Tammy Perri
Western & Northwest Regions



Dr. Amelia Hart
Southeast Region

PROFESSIONAL PARTNERS

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 mid-year and annual meetings. These representatives use their professional networks to secure speakers for these meetings or deliver their 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.

● Firms and industry

- Andersen
- Aprio
- BDO USA LLP
- Deloitte LLP
- EY
- Fifth Third Bank
- Grant Thornton LLP
- KPMG LLP
- Mazars USA
- Moss Adams LLP
- MYOB
- Protiviti
- PwC
- Republic Services
- RSM US LLP
- Skillful.ly
- Tipalti
- Wipfli LLP
- Xero
- Your Part Time Controller (YPTC)

● Professional education/exam providers

- Becker Professional Education
- Gleim Exam Prep
- Surgent Professional Education
- UWorld

● State societies

- California Society of CPAs (CalCPAs)
- Indiana Society of CPAs
- Maryland Association of CPAs (MACPA)
- Texas Society of CPAs
- Washington Society of CPAs

● Associations/not-for-profits

- Accounting & Financial Women's Alliance (AFWA)
- Association for International Certified Professional Accountants® (AICPA & CIMA)
- American Accounting Association (AAA)
- Association of Government Accountants (AGA)
- CA ANZ
- CFA Institute
- Educational Foundation for Women in Accounting Education & Research (EFWA)
- Graduate Management Admission Council (GMAC)
- International Association for Accounting Education and Research (IAAER)
- The Institute of Internal Auditors (IIA)
- Institute of Management Accountants (IMA)
- The NASBA Center for the Public Trust
- The PhD Project

● Incoming Professional Partners

- Alabama Society of CPAs
- California Department of Tax and Fee Administration (CDTFA)
- New Jersey Society of CPAs
- New York Society of CPAs
- North Carolina Association of CPAs (NCACPA)

FIRMS AND INDUSTRY



PROFESSIONAL EDUCATION/EXAM PROVIDERS



STATE SOCIETIES



ASSOCIATIONS AND NOT-FOR-PROFITS



Accounting & Financial Women's Alliance
CONNECT • ADVANCE • LEAD



AICPA® & CIMA®
Together as the Association of International
Certified Professional Accountants



American
Accounting
Association



AGA®



CFA Institute



THE
EDUCATIONAL
FOUNDATION FOR
WOMEN IN
ACCOUNTING
Empowering women through education since 1966



IAAER
International Association for Accounting
Education and Research



The Institute of
Internal Auditors



The Association of
Accountants and
Financial Professionals
in Business

NASBA

THE
PhD
PROJECT

INCOMING PROFESSIONAL PARTNERS



ALABAMA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS



CDTFA
CALIFORNIA DEPARTMENT OF
TAX AND FEE ADMINISTRATION



NJCPA



NYSSCPA



2023 MID-YEAR MEETINGS

TOTAL ATTENDANCE: 1,078

● HIGHLIGHTS

• Service Activity

- Sock it to 'em

• Houston, TX

- Co-Host Chapters
 - Sam Houston State University (Kappa Mu)
 - Nicholls State University (Iota Sigma)
- Keynote Speaker
 - Billy Williams, CPA – Audit Partner at KPMG – President, NABA Houston KPMG Houston Diversity, Equity, Inclusion Leader

• Seattle, WA

- Co-Host Chapters
 - Seattle University (Delta Eta)
 - University of Nevada, Las Vegas (Theta Omicron)
- Keynote Speakers
 - Jeff Dunn & Peter Fonfara – Seattle Seahawks

• Charlotte, NC

- Co-Host Chapters
 - University of North Carolina at Charlotte (Eta Alpha)
 - Appalachian State University (Epsilon Kappa)
- Keynote Speaker
 - Malcomb Coley, CPA – Partner, US – Central Region Private Leader & Charlotte Managing Partner, EY LLP

• Pittsburgh, PA

- Co-Host Chapters
 - University of Scranton (Nu Kappa)
 - West Chester University (Nu Zeta)
- Keynote Speakers
 - Tifphani White-King and Brian Ash, Mazars USA

• Milwaukee, WI

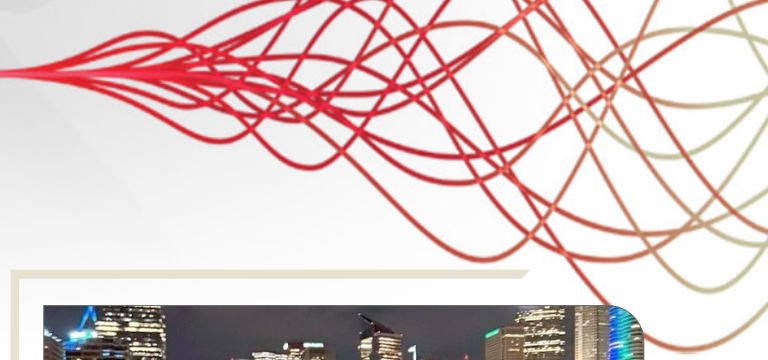
- Co-Host Chapters
 - Marquette University (Psi)
 - Ball State University (Zeta Omega)
- Keynote Speaker
 - Heidi Bostic, Ph.D., Marquette University Dean, College of Arts and Sciences

• Melbourne, Australia

- Host Chapters sponsor: The University of Melbourne
- Professional Presentations
 - MYOB
 - CAA NZ

Thank you to our Mid-Year Sponsors

- Host Chapters sponsor: Wipfli
- Coffee Break sponsors:
 - EFWA – Educational Foundation for Women in Accounting
 - Gleim Exam Prep
 - Your Part-Time Controller, LLC (YPTC)



Strategic Plan Recap for 2022–23

● Financial Transparency

- FY24 Budget approved by the Board.
- Both internal and external audits were conducted and completed between May and July 2023.

● BAP Impact for FY23

- **BAP chapters conducted:**
 - **2,353** Reaching out activities
 - **1,725** Professional activities
 - **538** Service activities
 - **191** chapters held at least one Essential Skills session
- **Chapter Reporting for FY23:**
 - **10** Gold
 - **123** Superior
 - **29** Distinguished

● Customer/Stakeholders & Chapter Engagement

- In fall 2021, we applied for and were approved for a \$54,500 grant from the AICPA Foundation. The DEI scholarship and travel stipends were available to underrepresented students.
 - Reviewed and updated our Strategic Priorities:
 - Established Task Force Committees to focus on the following initiatives:
 - Alumni Succession
 - Chapter Engagement – Chapter Reporting focused on Impact rather than hours.
 - 2023 Mid-Year Meetings
 - 1,078 attendees
 - Reimagined our Annual Meeting:
 - Added Alumni Track
 - Added new sponsorships
 - Etiquette Lunch
 - Fashion Show
 - Increased our social media presence by 30%

2023 ANNUAL MEETING

● HIGHLIGHTS

- 915 Attendees
- 31 Best Practices Presentations
- 52 Chapter Operations Presentations
- 65 Project Run With It Participants (PRWI)

● KEYNOTE SPEAKERS

- **Anthony Pugliese** – CIA, CPA, CGMA, CITP, President & CEO, The Institute of Internal Auditors
- **Simon T. Bailey** – BA, CSP, CPAE Professional Speaker, Coach, Board Member, TV Host and #LinkedInLearningInstructor
- **Dorri McWhorter** – President and Chief Executive Officer, YMCA of Metropolitan Chicago
- **Jessica Sayles** – MSA, CPA, Managing Principal, Houldsworth, Russo & Co.



2023 ANNUAL MEETING (CONTINUED)

Thank you to all our sponsors!

Company name	Competition sponsors
KPMG and KPMG Foundation	Gold Challenge and Superior Chapter Awards
Deloitte	Best Practices Awards
Moss Adams	Project Run With It
RSM US LLP	Outstanding Faculty Advisor Awards
EY	Inclusive Leadership Awards
IMA	Business Information Professional of the Year Awards
AICPA & CIMA	Medal of Inspiration Award
AICPA Foundation	DEI Membership and Travel Awards
Dr. Eric Jack	Dean's List Awards
IRS	VITA Awards

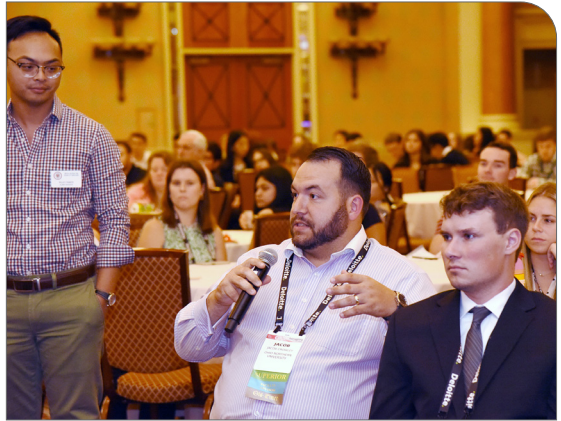
Company name	Annual Meeting sponsors
KPMG and KPMG Foundation	Community Impact Day
Moss Adams	Faculty Advisor Breakfast
The Institute of Internal Auditors	Etiquette & Awards Lunch Sponsor
The Institute of Internal Auditors	Fashion Show Sponsor
Macias Gini & O'Connell LLP (MGO)	Keynote Sponsor
Deloitte	Lanyard Sponsor
CPA.com	Mobile App Sponsor
AICPA & CIMA	Professional Headshot Sponsor
Becker Professional Education	Attendee Reception Sponsor
Cohn Reznick LLP	Attendee Reception Sponsor
Aprio	Refreshment Break (Friday Morning)
Gleim Exam Prep	Refreshment Break (Friday Afternoon)
The University of Texas Rio Grande Valley	Refreshment Break (Saturday Morning)
Your Part-Time Controller, LLC	Wi-Fi Sponsor

• Community Impact Day

- **675** – Participants
- **128,000** – Meals produced
- **Pack Shack** – Funnel Awesomeness Awards
 - Boise State University, Zeta Psi chapter
 - University of Alabama at Birmingham, Delta Chi chapter
- **School Supply Kit Fundraising Winner**
 - Florida Gulf Coast University, Mu Lambda chapter



2023 ANNUAL MEETING (CONTINUED)



AWARDS, COMPETITIONS AND RECOGNITIONS

OUTSTANDING DEAN

Dean Michael Hartline

Ph.D., Florida State University

In 2022, Florida State University President Richard McCullough appointed Hartline interim vice president for university advancement and interim executive vice president and president of the FSU Foundation. He split his time between the offices of the FSU Foundation and the College of Business during the search to find a permanent successor.

Before assuming his current position of dean, he served as interim dean for nine months, where he initiated a revision of the college's strategic plan to establish goals and metrics that better align the college toward preeminence and the university's priority of becoming a Top 15 public institution. As interim dean, he also played a major role in securing a \$100 million gift from Jan Moran and The Jim Moran Foundation to further expand the Jim Moran Institute for Global Entrepreneurship and establish the Jim Moran College of Entrepreneurship, the largest independent, interdisciplinary entrepreneurship school of its kind in the nation.

Dean Hartline has authored or co-authored numerous books and articles, including several publications in top-tier journals. He has served on the editorial review boards of several academic journals, made numerous presentations to industry and academic audiences and co-chaired two international conferences for the American Marketing Association. He is the former vice president of development for the Academy of Marketing Science. He has won numerous teaching and research awards, has taught MBA courses



in marketing strategy and corporate reputation management, and taught undergraduate courses in services marketing and retailing. He also has served as a consultant to several for-profit and nonprofit organizations in the areas of marketing plan development, market feasibility analysis, customer satisfaction measurement, customer service training and pricing policy. His research interests include customer-contact issues in service delivery, service quality and productivity, new service development and non-ownership consumption.

Dean Hartline earned a Ph.D. in business administration from the Fogelman College of Business and Economics at the University of Memphis, and an MBA and bachelor's in marketing, both from Jacksonville State University (Alabama).

"It is so humbling and gratifying to accept Beta Alpha Psi's 2023 Outstanding Dean Award, which I consider a highlight of my 35 years in higher education. It is even more meaningful for me because the award is recommended by students, who continue to inspire the work that I do."

— Michael Hartline

AWARDS, COMPETITIONS AND RECOGNITIONS (CONTINUED)

BUSINESS INFORMATION PROFESSIONAL OF THE YEAR (BIPOY)

- Sponsored by IMA since 2011

- 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

Anthony Bucaro

Ph.D., CPA

Nominated by the Pi chapter,
Case Western Reserve University

Anthony Bucaro, CPA, Ph.D., joined the Weatherhead faculty in fall 2015, after receiving his Ph.D. in Accountancy from the University of Illinois at Urbana-Champaign. Before joining the academic community, Bucaro worked for 15 years in public accounting. He joined the international audit and accounting firm, Deloitte & Touche, in 1995, where his professional focus was financial statements and processes of large public and private companies. More specifically, he focused on the audit of business processes, risks and internal controls over financial reporting, and consulted with clients to improve their risk-related processes. Deloitte & Touche made Bucaro a partner in 2007. He left public practice in 2010 to pursue his Ph.D. in Accountancy and now uses his professional experience to guide practical, academic research related to effective audit processes, audit regulation, and other accounting topics, and to teach financial accounting, audit, and accounting information systems.



"That the student members of Beta Alpha Psi's Pi chapter nominated me for this award makes it perhaps the greatest honor of my academic career thus far. When I left public accounting in 2010, my desire was to join the ranks of faculty that engage with students every day. Educating the next generation of business information professionals is not just about helping them learn definitions and facts, but engaging them to think through future possibilities — possible answers to tough questions, possible career paths, and more. I am so humbled and honored to have been able to have some small impact on their futures."

— Anthony Bucaro

Michael J. Van De Loo, CPA

Managing Director, Andersen

Nominated by the Lambda Pi chapter,
Manhattan College

With over two decades of experience, Michael Van De Loo has assisted a varied array of clients with their tax and wealth management needs. Through Van De Loo's expertise and insight, he has developed relationships with many high-net-worth families and individuals.

Van De Loo's clients are primarily in the New York and Greenwich markets. Van De Loo specializes in services for founders of high-tech, entrepreneurial companies, family offices, and the owners and operators of private equity and hedge funds. He is the lead for the Venture-Backed Initiative in New York that focuses on addressing the needs of entrepreneurs.

Van De Loo's prior experience includes eight years with Arthur Andersen, where he began his career. In addition, he spent time in the Goldman Sachs Family Office, as well as serving as the CFO of the family office for a major New York hedge fund. Van De Loo is a founding member at Andersen.

As a contributing author, Van De Loo consulted on the *Tax Economics of Charitable Giving, 14th edition*. Van De Loo serves as a trustee for the Elizabeth Seton Children's Foundation. He also is a member of the advisory board for the O'Malley School of Business at Manhattan College. Previously, Van De Loo served as a trustee for Christian Brothers Academy in Albany, NY, as well as the Children's Rehabilitation Center in White Plains, NY.



Through his experience, Van De Loo has cultivated an expert ability to help high-net-worth families and individuals address complex tax matters with respect to planning opportunities and compliance. He is also one of the firm's leading experts on qualified small business stock. Van De Loo's specific experience in income, estate, gift, fiduciary, estate and charitable planning strategies make him an asset to all who he serves.

"My selection for this award is special as it is a testament to the amazing members of Beta Alpha Psi I've engaged with over the years. Stewardship is one of Andersen's core principles, so our work with the students at Manhattan College is an extension of my own goal to give back to an institution I love and my firm's objective to develop industry leaders."

— Michael J. Van De Loo

AWARDS, COMPETITIONS AND RECOGNITIONS (CONTINUED)

PROFESSIONAL SERVICES

April M. Stokes, CPA

Shareholder, Merki & Associates, P.C.

Nominated by the Beta Pi chapter,
University of North Texas

After graduating from UNT in 2002, Stokes pursued a public accounting career with Deloitte and rapidly rose through the ranks from intern to associate to senior and ultimately manager. Through this employment, she got the opportunity to work for Deloitte in its London office, where she became well-versed in international taxation. In 2008, her mother had significant health issues, so she returned home to Denton, TX, to assist her family. She also began work in her father's local CPA firm, Merki & Associates, P.C. After her mother's passing, she continued to work there. In 2015, she purchased firm ownership interest from the founding partners. Today, she co-manages Merki, has helped increase firm revenue growth by 34% and oversees direct preparation of 800 tax returns (i.e., partnerships, corporations, trusts, gift, estate and complex individuals).



"What an incredible honor to be this year's recipient of the Business Information Professional of the Year in Professional Services. I was surprised and very grateful to learn of the nomination by the Beta Pi Chapter at the University of North Texas. Beta Alpha Psi was a foundational element to my education and career in public accounting – first at Deloitte and now as a business owner. Thank you Beta Alpha Psi for all the work you do."

– April M. Stokes

MEDAL OF INSPIRATION

Sponsored by AICPA & CIMA since 2008

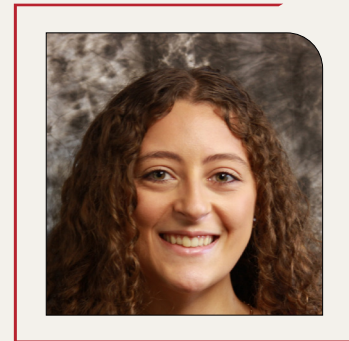
The Medal of Inspiration Award is bestowed upon a student who has experienced extreme hardships in their life and has demonstrated unusually high success despite that adversity.

Alyssa Gorman

Western Kentucky University
Eta Omicron Chapter

Being a first-generation college student, my academic studies have always held high importance to me. Throughout my time at Western Kentucky University, I have crossed paths with some exceptional students and mentors who inspired me to be more than just a student on the campus. I have found the importance of leadership and I hold its value close to me. The juxtaposition of the behavior modeling that I witnessed as a younger child to the modeling I have witnessed throughout college has given me the choice of how I want to move through life; I choose to better myself, my friends and family, and my community through acts of kindness, service, and camaraderie.

I have completed an industry-based internship with Schulte Hospitality Group and a public accounting internship with Harding Shymanski & Company, P.S.C. where I received a full-time job offer. I am enrolled in the Master of Accountancy and Data Analysis program at WKU and serve as a Graduate Assistant for the department, and I am sitting for the CPA Exam in November.



"I am so grateful to have been chosen for the 2023 Medal of Inspiration. To be considered an inspiration to others is an honor. I believe that through this award, I can continue growing both personally and professionally, and I can use that to positively impact the communities around me. It is my hope that everyone can follow their passions and accomplish their dreams by finding inspiration within themselves."

— Alyssa Gorman

PRESIDENT'S AWARDS

Each year, the current Beta Alpha Psi president recognizes individuals who go above and beyond their duties to the organization.

Danielle Bradley, MGO CPAs

Danielle Bradley is a Consulting Senior Manager in MGO's Credits and Incentives group. Danielle has specialized in consulting, primarily for software, technology and life science companies for over seven years. Danielle advises a wide range of companies, from start-ups to Fortune 100 businesses, to save her clients more than one billion in credits in incentives annually. She resides in Seattle, WA, where she has worked previously for both Moss Adams and KPMG.

Danielle graduated from Pacific Lutheran University (Delta Rho Chapter) with a B.B.A in Accounting in 2016 and an M.B.A with an emphasis in Technology and Innovation Management in 2017. She is an Enrolled Agent and represents clients before the IRS for federal tax credit and payroll tax credit claims, as well as before state governments for state credit claims.

Danielle is currently the Director At-large for Operational Sustainability on the Beta Alpha Psi Board of Directors. She served as the International Alumni Representative from 2018–20, helping create and launch the Alumni and Member Network.

In her personal and professional life, Danielle is very committed to volunteerism and has served in numerous leadership positions, including as committee leaders for her firms' Women's and Veteran's Business Resource Groups, a committee leader for multiple industry organizations in the technology and software space in Seattle and the West Coast, an alumni mentor for her alma mater, and is passionately involved with her local Habitat for Humanity and animal sanctuary and conservation groups for habitat restoration.



"Wow! This is such an amazing honor to receive the President's Award. Beta Alpha Psi has been an integral part of my life ever since I became a BAP member. BAP provided me a community and network I will forever cherish, experience and skills that continue to serve me in my career and the focus of integrating service in all I do. I knew once I graduated, I wanted to remain involved and give back to the organization that has provided me more than I can put into words. It has been a privilege and honor serving two board terms, creating the Alumni and Member Network, and serving as your 2023 Annual Meeting Chair. My hope is over the next five years we continue to become more connected, further build critical skill sets and continue to support our members at all phases and milestones in your career. Thank you so much again for this incredible honor and the ability to integrate my passions. And to Kimberly, thank you for your leadership and for investing in my growth; it means the world."

– Danielle Bradley

PRESIDENT'S AWARDS (CONTINUED)

Bonnie Briscoe Villarreal

Former Project Run With It coordinator and past advisor, Utah State University

Bonnie Briscoe Villarreal was a trusted mentor and leader of the Delta Omega chapter at Utah State University in her role as faculty advisor. Under Bonnie's leadership, the Delta Omega chapter achieved Superior status for several years. Bonnie served as the international director of Project Run With It, sponsored by Moss Adams. Project Run With It (PRWI), which originated in 2008, is a unique competition designed to further the community service component of Beta Alpha Psi and provides student members with an opportunity to engage in a real-world consulting project. Beta Alpha Psi is grateful to Bonnie for her leadership and support.



"It has been a great honor to be involved in and help to coordinate the Project Run With It competition. I have loved working with representatives from Moss Adams, LP and the Beta Alpha Psi executives as well as many faculty advisors and professionals who have helped with judging and providing contacts at many not-for-profit organizations.

"It has been inspiring to learn of and assist passionate NFP leaders and to see our student participants catch the vision, develop creative business solutions, and present them in a very professional manner.

"Many participants have formed enduring friendships that will endure long beyond the time on campuses. I know that is true for me as well, and I thank the Beta Alpha Psi presidency for commemorating my involvement with a beautiful plaque that will always remind me of PRWI."

— Bonnie Briscoe Villarreal

PRESIDENT'S AWARDS (CONTINUED)

McKenzie Gravitt, CPA

Hershey Milton School

McKenzie Gravitt is a Senior Financial Analyst with the Milton Hershey School in Hershey, Pennsylvania. Prior to that she was a Senior Associate in KPMG's Business Tax Services group. She joined the Harrisburg office after moving to Hershey, PA and previously worked for EY in Birmingham, Alabama. McKenzie graduated from The University of Alabama in 2017 and a Master of Tax Accounting in 2018.

During her time at UA, McKenzie was a member of the Alpha Beta chapter of Beta Alpha Psi. She served as the chapter's Service Coordinator and was later elected President. Following graduation, she also served as the 2018–2019 Southeast Regional Alumni Representative, 2019–2020 Alumni Taskforce Chair, 2020–2022 International Alumni Representative, and continues to work with the BAP Alumni Taskforce on various initiatives.



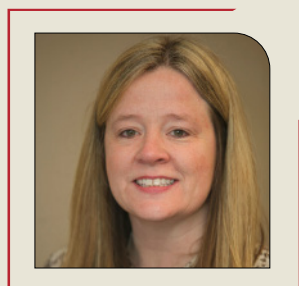
"I am overwhelmingly fortunate to have found an organization that not only allows me to stretch my creative wings while volunteering, enables me to mentor business students all over the U.S. and internationally, and has also allowed me to expand my network with some amazing colleagues and FRIENDS! I have had the privilege of working with Kimberly Ellison-Taylor and the rest of the BAP board for many years now, and I appreciate so much that they have always supported my crazy ideas for BAP. From revamping our organization's social media strategy to creating a Find the Fraud forensic accounting to create a leadership activity for our conferences last spring, Kimberly has been such a wonderful cheerleader and advocate for programs that will excite our students about BAP! I am so excited to be a recipient of the 2023 President's Award this year, even more so because it's coming from someone that I respect so much!"

– McKenzie Gravitt

2023 OUTSTANDING FACULTY ADVISOR WINNERS

- **Sponsored by RSM US 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.
- Beta Alpha Psi and RSM US LLP are pleased to recognize four 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.



Jennifer M. Cainas
University of South Florida
Delta Gamma chapter

"I am honored and humbled to receive the 2023 Outstanding Faculty Advisor Award. My students' hard work and dedication to our chapter inspire me each and every day."

— Jennifer M. Cainas



Rose Hu
University at Buffalo
Zeta Theta chapter

"I'm so humbled and honored to receive this award, and grateful for all the ways Beta Alpha Psi has facilitated me spending time investing in the future of our profession. From being a candidate, member, and then officer during my own time as a student years ago, to being an active alum and speaking at our chapter's professional activities, and now as faculty advisor, BAP has been a meaningful and rewarding part of my life and it has been a pleasure to serve our students and profession in this way. Winning this award is a wonderful affirmation that I've been able to make a difference in the lives of my students, and for that I'm so appreciative. I'm grateful for all those that made this recognition possible, and for my students who continue to inspire me each day."

— Rose Hu

2023 OUTSTANDING FACULTY ADVISOR WINNERS (CONTINUED)



Ann Stott

Ohio University
Alpha Kappa chapter

"Thank you to BAP and RSM for this award, it is a great honor. BAP was an important part of my life as a graduate student many years ago and it has been a privilege to have the opportunity to continue being involved. Through BAP, I am able to watch my students grow and learn both professionally and academically while giving back to our community."

— Ann Stott



Rachel Gambol

The University of Tampa
Lambda Beta chapter

"I am truly humbled and honored to receive this award. With nearly 20-years of corporate experience under my belt, I had a strong desire to change careers and become a teacher. I wanted to have a challenging learning environment where I could push students and help them not only meet career expectations, but exceed them. I would never have guessed just how much I would be the one blessed by my career switch until I had the privilege of becoming the faculty advisor for Beta Alpha Psi. BAP members are relentless in their pursuit of excellence while balancing this with volunteering their time to make their communities a better place. I have also been very fortunate throughout the years to have an amazing group of BAP members and talented Exec team in our Chapter. The teacher became the student with the many value-added improvements our BAP members made not only to our Chapter but for our University's financial information majors and programs as well. I'm humbled to earn this award and will never stop putting in my best effort to keep the prestigious BAP organization and it's members going strong for many years to come."

— Rachel Gambol

BEST PRACTICES

- **Sponsored by Deloitte 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 2023 included Reimagine Leadership & Collaboration, Reimagine Community Service, and Reimagine Career Aspirations.
- Each of the winning teams from the six mid-year meetings competed for their winning topic. All mid-year first and second-place teams were invited to present in person at the 2023 Annual Meeting in Las Vegas, NV.

2023 ANNUAL MEETING WINNERS

REIMAGINE LEADERSHIP AND COLLABORATION

1st Place:	Ohio Northern University	Mu Delta chapter
2nd Place:	Monash University	Xi Epsilon chapter
3rd Place:	University of South Florida	Delta Gamma chapter

REIMAGINE COMMUNITY SERVICE

1st Place:	University at Buffalo	Zeta Theta chapter
2nd Place:	Salisbury University	Iota Pi chapter
3rd Place:	Monash University	Xi Epsilon chapter

REIMAGINE CAREER ASPIRATIONS

1st Place:	Swinburne University of Technology	Xi Sigma chapter
2nd Place:	University of Nebraska–Lincoln	Delta Omicron chapter
3rd Place:	University of North Carolina at Charlotte	Eta Alpha 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 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 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 FOR THE 2023 EY INCLUSIVE LEADERSHIP AWARDS

1st Place:	The University of Sydney	Lambda Omega chapter
2nd Place:	Seattle University	Delta Eta chapter
3rd Place:	Stonehill College	Mu Omega chapter
3rd Place:	University of Massachusetts Amherst	Delta Nu chapter
3rd Place:	University of Nevada Las Vegas	Theta Omicron chapter

GOLD 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 Superior Chapter. 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 must submit a seven-minute video presentation that explains and/or demonstrates why their chapter deserves the KPMG Gold Challenge award. A chapter must have Superior status for the current year and prior year to qualify as Gold.

WINNERS:

Boise State University	Zeta Psi chapter
Florida International University	Eta Iota chapter
Monash University	Xi Epsilon chapter
Salisbury University	Iota Pi chapter
The University of Alabama	Alpha Beta chapter
The University of Sydney	Lambda Omega chapter
University of Central Arkansas	Theta Lambda chapter
University of South Florida	Delta Gamma chapter
University of Technology Sydney	Upsilon Tau Sigma chapter
Western Kentucky University	Eta Omicron chapter

PROJECT RUN WITH IT

- **Sponsored by Moss Adams LLP since 2008**

- Project Run With It involved 65 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 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.
- Presented by Kinman Tong, CPA, from Moss Adams LLP.

WINNERS

2023 NOT-FOR-PROFITS AND WINNING TEAMS

Opportunity Village – Case A (Winner – Team 2)

Kate Dittman	University of Nebraska at Omaha	Gamma Kappa chapter
Madison Kuntz	University of Arkansas	Alpha Iota chapter
Greg Oh	Seattle University	Delta Eta chapter
Peter Zamora	Swinburne University of Technology	Xi Sigma chapter

Opportunity Village – Case B (Winner – Team 6)

Claren Dunn	Boise State University	Zeta Psi chapter
Utkarsh Maini	Ithaca College	Mu Alpha chapter
Sara McGinnis	Western Illinois University	Zeta Beta chapter
Jennifer Smith	Georgia Southern University	Eta Omicron chapter

S.A.F.E. House (Winner – Team 5)

Mitchell Dorling	Monash University	Xi Epsilon chapter
Mansi Ghela	Valdosta State University	Mu Zeta chapter
Seth Turman	Texas State University	Eta Omicron Chapter

VITA AWARDS

- **Sponsored by IRS**

- The Volunteer Income Tax Assistance (VITA) Program offers free tax help to people who make \$60,000 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.

2022 VITA PARTICIPANTS

Small Chapters – Return Preparation	
Washington State University Vancouver	Nu Theta chapter
Small Chapters – Volunteerism	
Marshall University	Kappa Phi chapter
Washington University in St. Louis	Nu Iota chapter
Valdosta State University	Mu Zeta chapter
Mid-level Chapters – Return Preparation	
California State University Long Beach	Gamma Omega chapter
Mid-level Chapters – Volunteerism	
Creighton University	Alpha Nu chapter
Large Chapters – Return Preparation	
California State University Northridge	Epsilon Chi chapter
Large Chapters – Volunteerism	
SUNY Oswego	Lambda Zeta chapter

VITA AWARDS (CONTINUED)

2022 VITA PARTICIPANTS

2023 VITA Return Preparation Recipients	
Grand Valley State University	Kappa Beta chapter
Wichita State University	Epsilon Tau chapter
Utah State University	Delta Omega chapter
The University of Texas Rio Grande Valley	Xi Phi chapter
University of Oregon	Beta chapter
University of North Georgia	Mu Gamma chapter
University of Michigan-Dearborn	Kappa Sigma chapter
University of Louisiana at Monroe	Eta Sigma chapter
University of Kentucky	Alpha Mu chapter
Colorado State University	Gamma Tau chapter
University of Central Missouri	Iota Mu chapter
University of Central Arkansas	Theta Lambda Chapter
Tennessee State University	Mu Theta chapter
Temple University	Alpha Phi chapter
San Francisco State University	Beta Chi chapter
Ohio Northern University	Mu Delta chapter
Middle Tennessee State University	Zeta Gamma chapter
Marist College	Lambda Eta chapter
Ithaca College	Mu Alpha chapter
Idaho State University	Eta Lambda chapter
Ball State University	Zeta Omega chapter

RECOGNITION

BETA ALPHA PSI DEI/AICPA SCHOLARSHIP

We have over **300 chapters** in the U.S. and service many communities. To expand our representation in these communities, the AICPA Foundation approved a grant for Beta Alpha Psi to help broaden our membership inclusion of underrepresented minority students and also offer these students the opportunity to engage and network with other Beta Alpha Psi students. The AICPA Foundation DEI grant awarded \$5,175 in membership grants to 69 students.

AICPA FOUNDATION DEI TRAVEL GRANT RECIPIENTS FOR 2023 ANNUAL MEETING IN LAS VEGAS, NV

- Six recipients at \$500 each; total of \$3,000 awarded

DEAN'S LIST AWARD WINNERS 2023

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 2023 Annual Meeting had the opportunity to receive a travel stipend from Beta Alpha Psi. Dean's List Awards winners for 2023.

2023 WINNERS:

Marshall Barbosa	The University of Texas Rio Grande Valley	Xi Phi chapter
Karla Martinez	The University of Memphis	Gamma Chi chapter

AWARD CHAPTERS

To qualify as superior, each chapter must report a designated number of Reaching Out Activities (ROAs) and each chapter must have a certain number of professional and service activities, as outlined in the Program for Chapter Activities. Each superior chapter receives a monetary award of \$500 from the KPMG Foundation.

- Gold – 10
- Superior – 123
- Distinguished – 29

AWARD CHAPTERS

GOLD CHAPTERS

School Name	Chapters Name	School Name	Chapters Name
Boise State University	Zeta Psi	The University of Sydney	Lambda Omega
Florida International University	Eta Iota	University of Central Arkansas	Theta Lambda
Monash University	Xi Epsilon	University of South Florida	Delta Gamma
Salisbury University	Iota Pi	University of Technology Sydney	Upsilon Tau Sigma
The University of Alabama	Alpha Beta	Western Kentucky University	Eta Omicron

SUPERIOR CHAPTERS

School Name	Chapters Name	School Name	Chapters Name
Appalachian State University	Epsilon Kappa	Eastern Illinois University	Theta Omega
Arizona State University	Beta Tau	Elon University	Lambda Xi
Auburn University	Epsilon Omicron	Fairfield University	Iota Psi
Auburn University at Montgomery	Xi Gamma	Florida Atlantic University	Eta Tau
Ball State University	Zeta Psi	Florida Gulf Coast University	Mu Lambda
Bentley University	Theta Gamma	Florida State University	Beta Rho
Bowling Green State University	Alpha Upsilon	Georgia Southern University	Zeta Delta
Bradley University	Zeta Lambda	Hofstra University	Delta Pi
Brigham Young University	Gamma Alpha	Idaho State University	Eta Lambda
California State University – Fresno	Gamma Omicron	Iowa State University	Iota Beta
California State University – Northridge	Epsilon Chi	Ithaca College	Mu Alpha
Case Western Reserve University	Pi	Jacksonville State University	Nu Phi
Clemson University	Zeta Rho	Kennesaw State University	Iota Tau
Deakin University	Xi Kappa	Lamar University	Zeta Tau

SUPERIOR CHAPTERS

School Name	Chapters Name	School Name	Chapters Name
Louisiana State University	Phi	San Diego State University	Beta Eta
Louisiana Tech University	Alpha Chi	San Francisco State University	Beta Chi
Loyola University Maryland	Eta Upsilon	Seattle University	Delta Eta
Manhattan College	Lambda Pi	Southeast Missouri State University	Mu Xi
Marquette University	Psi	Southern Illinois University at Carbondale	Gamma Zeta
Marshall University	Kappa Phi	St. John's University – Staten Island Campus	Kappa Zeta
Middle Tennessee State University	Zeta Gamma	Stonehill College	Mu Omega
Minnesota State University Mankato	Nu Chi	SUNY Oswego	Lambda Zeta
Missouri State University	Theta Pi	The University of Akron	Gamma Eta
Murray State University	Epsilon Nu	The University of Melbourne	Xi Lambda
North Carolina A&T State University	Zeta Sigma	The University of Memphis	Gamma Chi
North Carolina State University	Iota Omega	The University of Southern Mississippi	Zeta Mu
Northern Arizona University	Delta Upsilon	The University of Tampa	Lambda Beta
Ohio Northern University	Mu Delta	The University of Texas Rio Grande Valley	Xi Phi
Ohio University	Alpha Kappa	Truman State University	Kappa Nu
Oklahoma State University	Chi	University at Buffalo	Zeta Theta
Old Dominion University	Zeta Pi	University of Alabama at Birmingham	Delta Chi
Oregon State University	Epsilon	University of Arkansas	Alpha Iota
Pace University	Iota Lambda	University of Arkansas – Fort Smith	Nu Eta
Purdue University	Zeta Alpha	University of Central Florida	Epsilon Gamma
Quinnipiac University	Nu Alpha	University of Florida	Upsilon
Robert Morris University	Xi Delta		
Rutgers University – New Brunswick	Theta Mu		
Sam Houston State University	Kappa Mu		

AWARD CHAPTERS (CONTINUED)

SUPERIOR CHAPTERS

School Name	Chapters Name	School Name	Chapters Name
University of Hawaii – Manoa	Delta Theta	University of North Texas	Beta Pi
University of Iowa	Alpha Pi	University of Northern Colorado	Theta Psi
University of Kentucky	Alpha Mu	University of San Diego	Zeta Kappa
University of Louisiana at Lafayette	Kappa Theta	University of Scranton	Nu Kappa
University of Massachusetts – Amherst	Delta Nu	University of South Carolina Upstate	Xi Alpha
University of Massachusetts Dartmouth	Mu Phi	University of South Dakota	Theta Upsilon
University of Michigan – Flint	Eta Xi	University of Southern California	Iota
University of Michigan – Dearborn	Kappa Sigma	University of Southern Indiana	Lambda Mu
University of Mississippi	Alpha Theta	University of Tennessee at Chattanooga	Eta Kappa
University of Missouri – St. Louis	Gamma Psi	University of Tennessee at Knoxville	Alpha Lambda
University of Nebraska – Lincoln	Delta Omicron	University of Texas at El Paso	Theta Beta
University of Nebraska at Omaha	Gamma Kappa	University of Texas at Tyler	Mu Kappa
University of Nevada – Las Vegas	Theta Omicron	University of Washington	Delta
University of Nevada – Reno	Zeta Iota	University of Washington Bothell	Mu Psi
University of New Orleans	Gamma Sigma	University of West Florida	Iota Phi
University of North Alabama	Xi Zeta	University of Wisconsin – Whitewater	Epsilon Rho
University of North Carolina at Charlotte	Eta Alpha	University of Wisconsin Oshkosh	Iota Rho
University of North Carolina at Greensboro	Zeta Chi	Utah State University	Delta Omega
University of North Carolina Wilmington	Iota Alpha	Valdosta State University	Mu Zeta
University of North Florida	Xi Eta	Virginia Commonwealth University	Epsilon Zeta
University of North Georgia	Nu Gamma	Washington State University	Delta Epsilon
		Washington State University – Vancouver	Nu Theta
		West Chester University	Nu Zeta

SUPERIOR CHAPTERS

School Name	Chapters Name	School Name	Chapters Name
Western Illinois University	Zeta Beta	Wichita State University	Epsilon Tau
Western Michigan University	Gamma Rho	Widener University	Kappa Iota
Western Washington University	Theta Phi	Youngstown State University	Kappa Xi

DISTINGUISHED CHAPTERS

School Name	Chapters Name	School Name	Chapters Name
California State University – Long Beach	Gamma Omega	San Jose State University	Gamma Xi
Central Michigan University	Eta Epsilon	Siena College	Nu Xi
Cleveland State University	Delta Psi	Stony Brook University	Petitioning
College of Charleston	Mu Beta	Temple University	Alpha Phi
Colorado State University	Gamma Tau	University of Arizona	Beta Omicron
Creighton University	Alpha Nu	University of Arkansas at Little Rock	Epsilon Pi
Eastern Washington University	Delta Sigma	University of Georgia	Beta Upsilon
Fairleigh Dickinson University	Nu Sigma	University of Houston – Clear Lake	Zeta Upsilon
Illinois State University	Kappa Delta	University of Illinois	Alpha
Marist College	Lambda Eta	University of Louisiana at Monroe	Eta Sigma
Mississippi State University	Beta Kappa	University of Notre Dame	Beta Sigma
Nicholls State University	Iota Sigma	University of Oregon	Beta
Northwestern State University	Xi Nu	University of Wisconsin – Milwaukee	Eta Theta
Portland State University	Epsilon Alpha	Washington University in St. Louis	Nu Iota
Rowan University	Xi Theta		

AWARDS SPONSORS RECOGNITION FY23

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 support, involvement and enthusiasm of our sponsoring professional partners.



- KPMG U.S. Foundation, Inc. awarded \$25,000 to Gold status chapters and \$61,500 to Superior status chapters. In total, the Foundation donated over \$87,000 for award-status chapters. The Foundation donated \$30,000 toward Community Impact Day.



- KPMG LLP – University Talent Acquisition contributed \$20,000 toward Community Impact Day.



- Deloitte awarded \$30,000 to chapters participating in the Best Practices competition at both mid-year and international levels.



- RSM US LLP awarded \$20,000 to the Outstanding Faculty Advisor award recipients.



- EY awarded \$13,250 to chapters that placed in the Inclusive Leadership competition.



- Moss Adams LLP awarded \$11,000 to the Project Run With It winning teams and contributed over \$20,000 for program expenses. Moss Adams LLP contributed \$20,000 for the Faculty Advisor breakfast at the annual meeting.



- The Institute of Management Accountants (IMA) awarded \$6,000 to the Business Information Professional of the Year award recipients.



- The AICPA & CIMA awarded \$5,000 to the Medal of Inspiration award recipient.



- The AICPA Foundation DEI grant awarded \$3,000 for a total of 6 students to attend the annual meeting.
- The AICPA Foundation DEI grant awarded \$5,175 in membership grants to 69 students.



- The Dean's list awarded \$2,500 for students to attend the annual meeting. Dr. Eric Jack, former Dean at the College School of Business at the University of Alabama at Birmingham, funded the award.

THANK YOU TO OUR ANNUAL MEETING SPONSORS



- **The Institute of Internal Auditors Member Partners Sponsorships:**
 - Etiquette & Awards Lunch Sponsor – \$5,500
 - Fashion Show Sponsor – \$5,000



- **Macias Gini & O'Connell LLP – Non-Member Partners Sponsorship:**
 - Keynote Sponsor – \$5,000



- **Deloitte – Beta Alpha Psi Member Partners Sponsorship:**
 - Lanyard Sponsor – \$6,000



- **CPA.com – Non-Member Partners Sponsorship:**
 - Mobile App Sponsor – \$5,000



- **AICPA & CIMA Member Partners Sponsorship:**
 - Professional Headshot Sponsor – \$6,500



- **Becker Member Partners Sponsorship:**
 - Reception Sponsor – \$6,000



- **CohnReznick LLP – Non-Member Partners Sponsorship:**
 - Reception Sponsor – \$6,000



- **Aprio Member Partners Sponsorships:**
 - Refreshment Break (Friday Morning) – \$3,000



- **Gleim Exam Prep Member Partners Sponsorship:**
 - Refreshment Break (Friday Afternoon) – \$3,000



- **The University of Texas Rio Grande Valley – Beta Alpha Psi Member School Sponsorship:**
 - Refreshment Break (Saturday Morning) – \$3,000



- **Your Part-Time Controller, LLC Member Partners Sponsorship:**
 - Wi-Fi Sponsor – \$7,000







Beta Alpha Psi

220 Leigh Farm Road, Durham, NC 27707-8110

Phone: 919.402.4044

Email: bap@bap.org | Website: bap.org

Twitter: [@_BetaAlphaPsi](https://twitter.com/_BetaAlphaPsi)

Facebook: [Facebook.com/BetaAlphaPsiIntl](https://www.facebook.com/BetaAlphaPsiIntl)

LinkedIn: [Beta Alpha Psi International](https://www.linkedin.com/company/beta-alpha-psi-international)

Instagram: [@_BetaAlphaPsi](https://www.instagram.com/_BetaAlphaPsi)

© 2023 Beta Alpha Psi. All Rights Reserved. 2308-510009