

UNIVERSITY OF KENTUCKY



MEMBER HANDBOOK

Fall 2016

UNIVERSITY OF KENTUCKY

BETA ALPHA PSI

Beta Alpha Psi is a national scholastic and professional fraternity for Financial Information students and professionals. The primary objective of the fraternity is to encourage and give recognition to scholastic and professional excellence in the business information field.

Beta Alpha Psi was founded in 1919. The University of Kentucky's Alpha Mu chapter of Beta Alpha Psi was chartered in 1952. Today it is one of 289 chapters nationwide with over 300,000 members initiated since the Fraternity's formation.

POLICIES OF THE FRATERNITY

- **All events must reflect the professional nature of the fraternity.**

In keeping with the professional nature of Beta Alpha Psi, the Board of Directors requires adherence to the policy that no national, regional or local chapter activity has content that is demeaning or derogatory to any individual or group of individuals.

- **No Alcohol Policy**

Beta Alpha Psi prohibits the consumption of alcoholic beverages at any meetings, functions, or events that are sponsored, publicized, or otherwise endorsed by Beta Alpha Psi.

The prohibition of alcohol applies to the following:

- chapter meetings, regional meetings, national meetings, the Thomas J. Burns Undergraduate Student Seminar, the graduate case seminar, leadership programs, and all other meetings or programs of Beta Alpha Psi;
- All alcoholic products whether provided by the chapter, by a speaker or external organization, or whether available at a charge to members and/or guests.

Violation of this policy will result in sanctions as deemed appropriate by the Beta Alpha Psi Board of Directors.

- **No Solicitation Policy**

It is the policy of the Board to not permit chapter activities to be used as a conduit for the sale of products or services to students. Persons should not be asked to participate in a chapter activity if their participation is primarily promotional in nature. Any presentation regarding professional examinations, preparation for the examinations or a demonstration of an examination review program by a representative of a provider of review services is considered promotional in nature. Any chapter event, at which the chapter permits the solicitation of its members to purchase products or services, will result in the event being assigned no credit in any category of the Program for Chapter Activities.

CONTACT INFORMATION

BETA ALPHA PSI
ALPHA MU CHAPTER
COLLEGE OF BUSINESS AND ECONOMICS
SCHOOL OF ACCOUNTANCY
UNIVERSITY OF KENTUCKY
LEXINGTON, KY 40506
uofk.bap@gmail.com

Megan Garrison, President
270-834-9286
megangarrison@outlook.com

Austin Gocke, VP of Activities
awgo224@g.uky.edu
502-551-0159

Aixi Yang, VP of Community Service
aya223.edu@gmail.com

John Archambault, Treasurer
john.archambault@uky.edu

Matt Reynolds, VP of Membership
msreyn00@gmail.com

Bradanne Toney, National Reporter
bradanne.toney@uky.edu

Prof. Jennifer Siebenthaler, Faculty Advisor
Office: 859-257-3031
JWSiebenthaler@uky.edu

Chapter Website: <http://gatton.uky.edu/programs/undergraduate/professional-development/student-organizations/beta-alpha-psi>

National Website: www.bap.org

BETA ALPHA PSI
Membership Contract
Fall 2016

The following is a list of the requirements for membership in the Alpha Mu Chapter of Beta Alpha Psi for the current semester:

- **MEMBERSHIP DUES**
 - Pledges: \$105 (\$65 National Pledge Fee, \$40 Chapter Fee) due September 06 to John Archambault, Treasurer.
 - Members: \$40 due Tuesday, September 06 to John Archambault, Treasurer.
 - A processing fee of \$20 will be assessed on late payments and overdrawn checks.
- **ATTENDANCE**
 - Technical Presentations: Pledges may miss only **ONE (1)** technical presentation and initiated members may only miss **TWO (2)** technical presentations for professional or personal reasons.
 - Socials: Everyone must attend all 6 socials. You may use up to 3 valid excuses.
 - Special Events: Each member and pledge must attend any special events organized by the Chapter (such as Community Service Event)
- **CHAPTER INVOLVEMENT**
 - Community Service: Pledges must participate in **10 hours of community service** and initiated members must participate in **8 hours of community service** per semester as follows: At least 4 hours of financial literacy and the remaining hours may be other Beta Alpha Psi organized opportunities or with pre-approved outside organizations. **All community service hours must be completed and be reported by Wednesday, November 17.**
- **OTHER**
 - Dress code for all meetings is **BUSINESS CASUAL** unless otherwise stated.
 - Professional behavior is expected at all times.
 - Members and pledges are required to be punctual and present for the duration of all organized events.
 - Record or registration of attendance to all events is sole responsibility of the member/pledge.
 - GPA must be no lower than 3.2 overall and in upper division accounting.

If any of the above requirements are not fulfilled, membership in the organization is forfeited.

Print Name _____ E-Mail _____

Signature _____ Date _____



BETA ALPHA PSI
The International Honor Organization for
Financial Information Students and Professionals

University of Kentucky Alpha Mu Chapter Fall 2016 Tentative Schedule

September 01: First Meeting of the Semester (Informational & Graham Speakers)

PwC Social (Location TBD – After meeting)

September 07: MCM Social held at Gattitown, 6:00-8:00 pm

September 08: **Meet the Firms Night**, 5:30-8:30

September 12: Dean Dorton Social held at Lexington Office, 6:00 pm

September 13: Crowe Horwath Social held at Malibu Jacks, 6:00 – 8:30 pm

September 14: EY Social (Details TBD)

September 15: BKD Social held at Pazzo's, 6:00-8:00 pm

September 29: MCM CPAs and Advisors Technical Presentation

October 13: TBD

October 20: Crowe Horwath Technical

October 27: LBMC Technical

November 3: PwC Technical

November 10: Dean Dorton Technical

November 17: Deloitte Technical

***All Community Service Hours Due

November 24: Thanksgiving – No meeting

December 01: EY Technical/ New Member Induction

(Other Networking, Social, or Community Service Events may be scheduled)
(All meetings will take place on Thursdays from 6-7PM in Gatton Room 199)



Who Should I contact?

Matt Reynolds- Please reach out to Matt first with your questions. He will be able to answer the majority of them. If you cannot attend a technical or a social, please contact him. Also, if you have any general questions regarding Beta Alpha Psi, he will be able to assist you. Any suggestions related to marketing, please feel free to e-mail Matt with any recommendations as to how we could improve our marketing strategy.

Aixi Yang - Any questions regarding community service.

Austin Gocke - If you would like any details about the events, such as time, attire, or location please contact Austin. However, please look at our schedule on our chapter's website to find out the dates of our meetings prior to asking Austin.

John Archambault - Any questions regarding your membership dues.

Beta Alpha Psi

Community Service

Fall 2016

Each returning member is required to complete 8 hours of community service per semester and each pledge is required to complete 10 hours as follows by Nov. 17.

- 4 hours Financial Literacy Involvement through BAP.
- The remaining hours of community service may be done either within BAP or outside of BAP with pre-approval from the VP of Community Service.
- If you choose to volunteer outside of Beta Alpha Psi, you must fill out the attached Outside Community Service Hours Form by Wednesday, Nov. 17.
- If you fail to complete the form, you will earn no credit.
- If you have any questions about BAP Community Service Requirements, please contact Aixi Yang.

Financial Literacy Involvement Opportunities (4 Hours Required)

❖ **Junior Achievement**

JA is a non-profit organization that partners with volunteers from the community to teach elementary students about their roles as individuals, workers and consumers, and to prepare middle/high school students for key economic and workforce issues they will face. JA's purpose is to inspire young people to value free enterprise, business and economics to improve the quality of their lives and be workforce ready.

- Students will team up in **2-3 person groups** and select a class to teach. You will need to select a day of the week that you will be available **6 weeks** in a row.
 - Dates/Times: Groups selected, 6 consecutive weeks
 - Location: Various Elementary, Middle, & High Schools in Lexington
 - Hours Awarded: 7 (One per class and one for planning)
 - Link to Sign Up (Group Leader should sign up for entire group)
<https://docs.google.com/spreadsheet/viewform?formkey=dE1aZ3lsS29XUE1nMUNWVnNLOUdvQkE6MA#gid=0>
 - Complete and return the application forms by **TBD**. Please note the application includes a mandatory background check that is completed online (<https://webapps.fcps.net/volunteer>) at no charge to the student that must be done by that date as well.
 - Returning volunteers to JA need not submit the forms, but will still need to sign up on the above link by **TBD** with their group, and any member who has not been with JA in the group needs to complete the form and background check.
 - Any student that does not complete the application form or background check will not be permitted to participate.

- New volunteers must attend the MANDATORY training that will be provided by Callie Tincher, Program Manager for JA of the Bluegrass, on **TBD** (which will be held after the technical meeting).

❖ **Tutoring**

Provide tutoring assistance to students in accounting courses.

- Dates/Times: Based on students needs
- Location: Set by tutor and student
- Hours Awarded: Number of hours spent with student requesting tutoring.
- Requirements: Grade of B or higher in course to tutor.
- Important Note: Tutoring has previously not been a heavily requested item by students, and as such should not be relied on as a means to fulfill your hour requirements. If a student requests tutoring directly to BAP, an e-mail will be sent out with the subject and available meeting times, the first qualified student to respond will receive the opportunity.
- The following form must also be filled out and signed by both the member and the student receiving tutoring. You may use the same form for recurring sessions, with the student receiving tutoring initialing each item.

❖ **Volunteer Income Tax Assistance Program (VITA)**

The Volunteer Income Tax Assistance (VITA) program offers free tax help to people who generally make \$54,000 or less, persons with disabilities, and the elderly and limited English-speaking taxpayers who need assistance in preparing their own tax returns. IRS-certified volunteers provide free basic income tax return preparation with electronic filing to qualified individuals.

- Three Saturdays or Fridays of Training (About five hours each)
- February 5th/6th, 12th/13th, 19th/20th
- Online Training Available
- Location: The College of Law
- Must take and pass four Internal Revenue Service tests to certify your tax law and return preparation knowledge. (About 8 hours total for all four tests). The tests are open book and online.
- Volunteer at the The College of Law Clinic. It will be open M-F 3-6PM and Saturdays Noon-5PM. (sign up three hours per week)
- The clinic is open Monday February 29th-Monday April 18th (closed Spring Break). There are other volunteer sites in Lexington too.
- Interested? Email Professor Douglas Michael at michaeld@uky.edu

Beta Alpha Psi – Volunteer Tutoring Form

This form must be submitted by November 17 for hours spent tutoring.
SUBMIT TO Aixi Yang.

Name of Member:

Signature of Member:

Date, Course Taught, Hours Spent, and Tutored Student's initials if multiple dates:

Total Number of Hours Completed:

Student Receiving Tutoring Name and E-mail or Phone Number:

Student Receiving Tutoring Signature:

Beta Alpha Psi – Outside Community Service Hours

This form must be submitted by November 17 for hours spent tutoring.
SUBMIT TO Aixi Yang.

Name of Member:

Date:

Name of Organization:

Description of Activities:

Total Number of Hours Completed:

Supervisor Name and Phone Number:

Supervisor Signature:
