UNIVERSITY

OF

KENTUCKY



MEMBER HANDBOOK

Fall 2022

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**BETA ALPHA PSI BACKGROUND**

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 over 300 chapters nationwide with over 300,000 members initiated since the Fraternity's formation.

### VISION

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

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

### PURPOSE

The purpose of Beta Alpha Psi is to engage with members, industry and educational institutions associated with the Beta Alpha Psi Professions to:

**Academic Excellence**  
Motivate, recognize and celebrate academic excellence  
  
**Professional Development**  
Facilitate workplace readiness, employment, credentialing, mentoring, networking and lifelong learning  
  
**Responsible Practices**  
Foster a commitment to ethics, service, belonging, and environmental, social, governance-responsible practices  
  
**Advocacy**  
Advocate for the benefits of education, practice, credentialing and partnering associated with the Beta Alpha Psi Professions

**Shaping**  
Support the shaping of the relevant and successful evolution of education, practice and credentialing associated with the Beta Alpha Psi Professions

**National Website:** [www.bap.org](http://www.bap.org)

**OFFICERS**

**Emily Cooper**

***President***

emilycooper@uky.edu 

**Abby Seavers**

***VP of Membership***

Abby.seavers@uky.edu

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**Kathleen Crosmer *Treasurer***

KathleenCrosmer@uky.edu

**Danny Fagan**

***VP Community Service***

Daniel.fagan@uky.edu A picture containing person, tree, outdoor, person

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**Nathan Stroud**

***VP of Activities***

Nathan.Stroud@uky.edu

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**Hannah Warren**

***National Reporter***

hannah.warren@uky.edu



**Olivia Ida *Tom Lewis, JD, MBA, CPA***

***VP of Marketing Faculty Advisor***

Olivia.ida@uky.edu tlewi3@uky.edu; Office: 435B

A picture containing person, outdoor, clothing, flower

Description automatically generated A person wearing glasses

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**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

**Chapter Website:**

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

**Fall 2022 SCHEDULE**

**August**

August 25, 2022 — Introductions/Graham Career Center Presentation

**September**

September 1, 2022 — Deloitte

September 8, 2022 — Meet the Firms Night (MFTN)

September 15, 2022 — HCA Healthcare

September 22, 2022 — KPMG

September 29, 2022 — PwC

**October**

October 6, 2022 — Dean Dorton

October 13, 2022 — Blue and Co.

October 20, 2022 — No Meeting (Midterms)

October 27, 2022 — MCM

**November**

November 3, 2022 — EY

November 10, 2022 — Kentucky Auditor of Public Accounts

November 17, 2022 — ARGI Financial Group

November 24, 2022 — No Meeting (Thanksgiving)

**December**

December 1, 2022 — Crowe

December 8, 2022 — End-of-Semester Meeting

(Other networking, social, or community service events may be scheduled)

(All Technical meetings will take place on Thursdays from

6:30 p.m. – 7:30 p.m. in Gatton Room 191 with light dinner provided)





**POLICIES OF THE FRATERNITY**

**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. All members are at all times expected to behave in a professional manner and to be punctual and present for all meetings and events. Dress code for all meetings and events is business casual unless otherwise stated.

**1. 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.

**2. Non-Discriminatory Policy**

Membership in Beta Alpha Psi is open to all UK students regardless of race, ethnicity, national origin, religious, faith, age, gender, gender identity and expression, sex, sexuality, economic class, social class, and all other identities represented on our campus.

**3. 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.

**4. Attendance Policy**

Definitions:

1. Pledge: A Pledge is considered anyone who is a new member of Beta Alpha Psi and has not yet participated in an initiation ceremony, including reciting the initiation pledge. If you were previously pledged and had your membership revoked and later reinstated, you are from then on considered a pledge until participation in a new initiation and initiation ceremony has occurred.
2. Member: A Member is any member of Beta Alpha Psi who has been initiated and whose membership is in good standing.

Each participating member of Beta Alpha Psi is required to attend a minimum number of technical meetings each semester. Pledges are required to attend no fewer than ten (10) technical meetings per semester and Members are required to attend no fewer than 9 technical meetings per semester. Failure to meet the minimum requirement will result in the forfeiture of your membership as well as any local and/or national dues paid. It is strongly encouraged that all members attend all technical meetings and social events throughout the semester.

Attendance will be tracked throughout the semester and any anticipated absences should be communicated to the VP of Membership in a timely manner. Pledges are allowed two (2) unexcused absences per semester and Members are allowed three (3) unexcused absences per semester bearing in mind the minimum attendance requirement. An absence is considered excused as defined in 5.2.4 and its subsections of the University Senate Rules. Senate Rules 5.2.4.2 defines the following as acceptable reasons for excused absences: (a) significant illness, (b) death of a family member, (c) trips for members of student organizations sponsored by an educational unit, trips for University classes, and trips for participation in intercollegiate athletic events, (d) major religious holidays, (e) interviews for graduate/professional school or full-time employment post-graduation, and (f) other circumstances found to fit “reasonable cause for nonattendance” by the instructor of record. Documentation will be required for excused absences. Exceeding the number of unexcused absences in a semester will result in the forfeiture of your membership as well as any local and/or national dues paid.

Each semester, one to two mandatory events may also be scheduled. These events will be announced at the beginning of the semester. Failure to participate in any event labeled as mandatory, absent acceptable documentation supporting an excused absence, will result in the forfeiture of your membership as well as any local and/or national dues paid.

**5. Community Service Policy**

All members are required to complete four (4) hours of financial literacy service hours per semester. These hours can be completed by tutoring other accounting students, participating in VITA, participating in Junior Achievement, or in other pre-approved activities.

In addition to the financial literacy hours, each Pledge is required to complete 6 additional hours of community service per semester. Each Member is required to complete 4 additional hours of community service per semester. If you choose to volunteer outside of Beta Alpha Psi, you must complete the attached Outside Community Service Hours form by October 21st, 2021. If you fail to complete the form, you will earn no credit. If you have any questions about BAP Community Service Requirements, please contact the VP of Community Service.

**COMMUNITY SERVICE**

**Financial Literacy Involvement Opportunities**

* **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 can do it individually or team up in and select a class to teach. You will need to select a day of the week that you will be available **for 5-6 weeks** in a semester.
* Location: Various Elementary, Middle, & High Schools in Lexington
* Hours Awarded: 7-8 (One per class and one for planning)
* **Tutoring**

Provide tutoring assistance to students in ACC 201, 202, 301, 302, 407, & 418

* Dates/Times: Based on student’s 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 you may want to be wary of relying on tutoring as a means to fulfill your community service 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. **This year, we are piloting a new program in which members can provide us with the classes they are interested in tutoring, and we will work to match members with students interested in tutoring. More information will be provided during our opening meeting.**
* The Volunteer Tutoring form must also be completed 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. This program takes place on UK’s campus in the Rosenberg College of Law, and runs from mid-February to mid-April. Further details will be provided during an information session during this semester.

**Beta Alpha Psi Involvement**

* **Community Service Event**
* We are in the early stages of planning a chapter-wide community service event this semester. Further details will be communicated as they become available as we advance throughout the semester and the planning process.
* **Community Engagement Event**
  + We are planning an engagement that will allow our chapter to directly benefit the greater Lexington community (i.e. school supplies drive for a local elementary school). Further details will be communicated later on in the semester.

**Beta Alpha Psi – Volunteer Tutoring Form**

This form must be submitted by October 31st, 2022, for hours spent tutoring.

*SUBMIT TO* Danny Fagan at daniel.fagan@uky.edu.

**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 October 31st, 2022 for hours spent doing community service work. *SUBMIT TO* Danny Fagan at daniel.fagan@uky.edu.

**Name of Member: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name of Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Description of Activities:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Total Number of Hours Completed:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Supervisor Name and Phone Number:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Supervisor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**WHO SHOULD I CONTACT?**

**Abby Seavers** - Please reach out to Abby first with your questions. She will be able to answer most of them. If you cannot attend a technical or a social event, please contact her. Also, if you have any general questions regarding Beta Alpha Psi, she will be able to assist you.

**Kathleen Crosmer** - Any questions regarding your membership dues.

**Danny Fagan**- Any questions regarding community service.

**Nathan Stroud** - If you would like any details about events, such as time, attire, or location please contact Nathan. In addition, he will be able to answer any questions about firm contract information.

**BETA ALPHA PSI**

Membership Contract

Fall 2022

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:** $100 due February 3, 2022 to Treasurer, Kathleen Crosmer.
  + **Members:** $55 due February 3, 2022 to Treasurer, Kathleen Crosmer.
  + A processing fee of $20 will be assessed on late payments/overdrawn checks.
* **ATTENDANCE**
  + **Pledges**: Requiredto attend **10** Fall Technical Presentation Meetings. No greater than 2 unexcused absences are allowed.
  + **Members**: are **required** to attend **9** Fall Technical Presentation Meetings. No greater than 3 unexcused absences are allowed.
  + There may be some virtual meetings this semester, and the expectation is that members will have cameras turned on to receive credit for attendance.
* **CHAPTER INVOLVEMENT**
  + **Pledges:** Required to participate in **10 hours** of community service per semester, at least 4 of which must be financial literacy hours.
  + **Members:** Required to participate in **8 hours** of community serviceper semester, at least 4 of which must be financial literacy hours.
  + Community service hours completed outside of Beta Alpha Psi events must be pre-approved.
  + **All community service hours must be completed and be reported by October 31st, 2022.**
* **OTHER**
  + Dress code for all meetings is **BUSINESS CASUAL** unless otherwise stated, with the addition of masks for all in-person events.
  + 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.
  + Must maintain minimum overall and accounting GPAs of 3.2.

If any of the above requirements are not fulfilled, membership in the organization as well as any local and/or national dues paid are forfeited.

Print Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-Mail \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_