

BETA ALPHA PSI EPSILON XI

Membership Packet
Fall 2023



ABOUT BETA ALPHA PSI

MISSION STATEMENT

Beta Alpha Psi, Epsilon Xi, is dedicated to providing opportunities and promoting character traits that will allow its members to have a fulfilling experience, which will aid them in finding and holding successful and meaningful careers in the financial services industry.

HISTORY

Beta Alpha Psi was founded in 1919. That means we are celebrating 100 years of BAP and there are now over 315 chapters on college and university campuses – with over 300,000 members initiated since Beta Alpha Psi's formation.

MEMBERSHIP

Membership in Beta Alpha Psi includes those persons of good moral character who have achieved scholastic and/or professional excellence in the fields of accounting, finance, or information systems, who have been initiated by an existing chapter, and who remain in good standing.

ACTIVITIES

The goal of chapter activities is to fully involve all members in chapter affairs. Successful chapter operation requires participation by all members in attending meetings, serving on committees, participating in activities, and striving for academic excellence. Employers of accounting, finance and information systems students are familiar with Beta Alpha Psi and its activities. It is understood that Beta Alpha Psi represents excellence and that its activities are designed to supplement a student's education.

MEMBERSHIP BENEFITS

PURPOSE

- To recognize and promote outstanding academic achievements in the fields of accounting, finance, and information systems
- To promote the study and practice of professional fields related to these disciplines
- To provide self-development opportunities and association among members and practicing financial professionals
- To encourage a sense of ethical, social, and public responsibility
- To enhance and complement the collegiate experience

PROFESSIONAL REPUTATION

Beta Alpha Psi is recognized and respected by the business community as a premier collegiate organization. Beta Alpha Psi's reputation can open doors to outstanding career opportunities in the fields of finance, accounting, and information systems. Potential employers know when they see Beta Alpha Psi on a resume, they are getting the best!

BONDING THROUGH ACTIVITIES AND SERVICE

As a member of Beta Alpha Psi, you will have ongoing opportunities to participate in campus and community service activities. Service activities include participating in fundraising projects for charity.

SCHOLASTIC ACHIEVEMENT

Academic excellence is not only welcomed, it is expected. Beta Alpha Psi requires its members to *maintain* at least a 3.0 GPA.

ENHANCED UNIVERSITY EXPERIENCE

Membership in Beta Alpha Psi is a wonderful and rewarding way to meet like-minded people who share many of the same goals and interests that you do.

NETWORK/RELATIONSHIP OPPORTUNITIES

Members of Beta Alpha Psi are able to develop professional friendships and relationships through various networking activities. Activities include field trips to companies and firms, attending joint meetings with professional organizations, and service activities.

FUTURE CONTACTS

Overall, Beta Alpha Psi is a tremendous way to interact with professionals and future professionals from whom you may later wish to seek employment. It is also a great way to develop strategic contacts and relationships with faculty members who can provide good potential job sources and references.

MEMBERSHIP REQUIREMENTS

GPA:	3.0 or above for both major and overall GPA
Major:	Accounting, Finance, Information Systems, Business/Data Analytics, MAcc, or MBA
Affiliate Dues:	<u>\$25</u> for 2023 Fall Semester
Candidate Dues:	<u>\$50</u> for 2023/2024 Academic Year (one-time \$75 fee to executive office once membership is reached)
Member Dues:	<u>\$50</u> for 2023/2024 Academic Year

	Professional Hours*	Meetings Required*	Service Hours*	Social Events	Initiation Banquet	Committee
Affiliate	6	6	6	0	NO	NO
Candidate	12	9	12	2	YES	YES
Minimum Member	12	9	12	2	NO	NO
Distinguished Status	15	9	15	2	YES	N/A
Superior Status	20	10	20	3	YES	CHAIR

** Meeting attendance counts as Professional Hours.*

** For Candidates and Members, 9 of the 12 Professional Hours have to be Beta Alpha Psi meetings. You can get all 12 of your hours through attending Beta Alpha Psi, but other meetings can be counted towards your Professional Hours.*

** You can obtain up to 5 outside Service Hours if approved by Marci Butterfield, Faculty Advisor of Beta Alpha Psi. You can get approval for other Professional Hours as well.*

Affiliate

A student is considered an Affiliate if he or she is enrolled in a 2000/3000 level class in the Accounting, Finance, IS, or Business/Data Analytics major. This status allows students to learn about Beta Alpha Psi. Students can explore whether or not Beta Alpha Psi is the right club for them.

Candidate

A student is considered a Candidate if he or she is enrolled in or has taken a 5000 level class. This status is for students who would like to further their opportunities in Beta Alpha Psi.

Member

A student is considered a Member once initiated at the Initiation Banquet after completing Candidate requirements. As a Member of Beta Alpha Psi, students have a network of students and professionals across the nation.

SEMESTER REQUIREMENTS

PROFESSIONAL HOURS

Each member and candidate must accumulate 12 hours* of professional activities during the semester. Weekly meetings count toward professional hours, except officer elections and other social type meetings; these will count as social events.

MEETINGS

Weekly meetings will be held every **Thursday from 12:15 – 1:30pm in SFEBB 110, basement level for the lunch meeting**. At weekly meetings, lunch is served as professionals from Big 4 firms; regional firms, local firms, governmental, industry, and many other accounting/finance/IS/Data positions present information about their chosen career paths.

SERVICE HOURS

Each candidate and member is required to earn 12 service hours* during the Fall 2023 semester. Serving on committees is the best way to fulfill the service hour requirement for both members and candidates. Candidates are **required** to join a committee their first semester in BAP (see Committees section).

SOCIAL EVENTS

Candidates and members are required to attend at least 2 social events during the Fall 2023 semester. Affiliates are not required to attend social events during the semester. Social events include networking with firms and other opportunities to mingle with fellow members of Beta Alpha Psi. The Initiation Banquet may count as one social event.

INITIATION BANQUET

The initiation banquet will be held on Friday, December 1st at the Marriott Hotel City Center, 200 S State Street from 12:00 PM to 2:00 PM. Qualified candidates will be inducted as members of Beta Alpha Psi, while enjoying the company of local professionals and a keynote speaker. Members, affiliates, and guests of candidates may attend at an additional cost.

COMMITTEES

Committees are in charge of organizing and implementing service activities throughout the year. **Every candidate is required to join a committee during their first semester.** Committees are also the best way for members to fulfill the service hour requirement each semester. To join a committee or become a committee chair, contact Reese Schone at u1153265@utah.edu.

FESTIVAL OF TREES

This committee assists in planning, decorating, and protecting a tree donated by Beta Alpha Psi to the Festival of Trees. Festival of Trees benefits Primary Children's Medical Center. Committee members need to meet multiple times during the semester to plan for this event and additional time may be required for fundraising. *The opportunity for this committee is only available during the Fall semester.*

LUNCH COMMITTEE

The meal committee is responsible for planning delicious menus, getting the best deals, staying within budget, picking up, and setting up food at meetings. This committee also provides cool beverages to each meeting, supports Campus Recycling by gathering all empty cans and bottles, and ensures the room is left spotless after each meeting. Committee members need to be available before and after the meeting to be able to participate in this committee and receive service hours.

TUTORING

Year-round tutoring is provided for students in beginning accounting classes, typically BCOR 3010, ACCTG 5110, ACCTG 5210, FINAN 3040, and FINAN 3050. This is provided by the tutoring center through the David Eccles School and Business. Not only does tutoring help struggling students, but it also ensures you are confident in your own basic accounting skills. Please contact Austin Tang or Reese Schone if you are interested.

VIDEO

Are you creative? This special committee will help prepare a recruiting video to be shared with future members of Beta Alpha Psi. The committee will also make the Gold Chapter Video to compete in the Gold Chapter Competition at Nationals.

TABLING

We need enthusiastic Beta Alpha Psi members to help with promotion at club tabling events. This is a fun way to get involved, meet new people inside and outside of Beta Alpha Psi, and earn service hours. More committee information will be provided throughout the semester.

VITA

Training and certification, as well as participation in the VITA Center will occur during spring semester. Training and certification will be necessary during fall semester to participate in VITA (the hours spent training will count towards your service hours requirement). This is one of the greatest opportunities to receive service hours as well as hands-on learning in individual tax preparation.

MEMBERSHIP TO-DO LIST

- Understand Membership Requirements
- Pay dues to Treasurer Christian Hernandez-Perez
 - Checks Payable to “Beta Alpha Psi” or pay cash (please obtain receipt)
 - \$25 for affiliates; \$50 for candidates*, \$50 for returning members
 - Dues MUST be paid BEFORE Friday, September 13th!**
- Print Academic Report (DARS) and submit to advisor, Marci Butterfield at marci.butterfield@eccles.utah.edu
- Make sure you have been added to the Beta Alpha Psi session on Canvas (after DARS report is approved and dues are paid)
- Optional/Highly Recommended: Register with Career Services and upload resume (careers.utah.edu)
- Register as student affiliate with Utah Association of Certified Public Accountants (www.uacpa.org)

Questions or Concerns? Email Johnny Fullmer/Jordan Fairbourn at u1184392@utah.edu or jordan.fairbourn@eccles.utah.edu

OFFICER CONTACTS

BAP Position	Officer Name	Email Address
Faculty Advisor	Marci Butterfield	marci.butterfield@eccles.utah.edu
President	Jordan Fairbourn	Jordan.fairbourn@eccles.utah.edu
President	Johnny Fullmer	u1184392@utah.edu
VP Activities	Luis Garcia	u1330470@utah.edu
	Sasha Van Deventer	sasha.vandeventer@utah.edu
VP Membership	Kari Rainbolt	kari.rainbolt@utah.edu
VP Committees	Reese Schone	u1153265@utah.edu
VP Service	Austin Tang	u1111455@utah.edu
Reporting	Paige Bishop	u1290768@utah.edu
Treasurer	Christian Hernandez-Perez	u1238976@utah.edu
Marketing/Technology	Hyun Jung Park	hyunjung.park@utah.edu

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