

BETA ALPHA PSI
Membership Packet
Spring 2019



EPSILON XI



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, voluntary tutoring, and assisting in the Volunteer Income Tax Assistance (VITA) program.

SCHOLASTIC ACHIEVEMENT

Academic excellence is not only welcomed, it is expected. Beta Alpha Psi requires its members to *maintain* at least a 3.3 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.

NETWORKING 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:	3.3 or above for both major and overall GPA						
Major:	Accounting, Finance, Information Systems, MAcc, or MBA						
Explorer Dues:	\$50 for 2019 Spring Semester (\$35 for returning explorers)						
Candidate Dues:	\$85 for 2019 Spring Semester						
Member Dues:	\$50 for 2019 Spring Semester (unless paid in full in Fall)						
	Professional Hours	Meetings Required*	Service Hours	VITA	Social Events	Initiation Banquet	Committee
Explorer	6	6	6	NO	0	NO	NO
Candidate	12	9	12	YES	2	YES	YES
Minimum Member	12	9	12	NO	2	NO	NO
Distinguished Status	15	9	15	NO	2	YES	N/A
Superior Status	20	10	20	NO	3	YES	CHAIR

*Meeting attendance counts as Professional Hours.

Explorer

A student is considered an Explorer if he or she is enrolled in a 2000 or 3000 level class. 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 Spring 2018 semester. Each explorer must accumulate 6 hours of professional activities during the Spring 2017 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 the Bill and Pat Child Family Community Hall, 7th floor (SFEBB 7170) for the lunch meeting.** At weekly meetings, lunch is served as professionals from Big 4 firms; local firms, industry, and many other accounting positions present information about their chosen career paths.

VITA

All candidates are required to participate in VITA in order to achieve membership. Training and certification, as well as participation in the VITA Center will occur during spring semester. A total of 5 hours (including training) is required of both fall and spring candidates. (the hours 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. If Candidates are inducted in Fall 2018, they will still be required to do VITA in Spring 2019.

SERVICE HOURS

Each candidate and member is required to earn 12 service hours during the Spring 2019 semester. Each explorer is required to earn 6 service hours during the Spring 2019 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 spring semester. Explorers are not required to attend social events during the spring semester. Social events include networking with firms and other opportunities to mingle with fellow member of Beta Alpha Psi. The Initiation Banquet may count as one social event.

INITIATION BANQUET

The initiation banquet will be held on Friday, November 30th at the Marriott Hotel City Center, on 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. Explorers are not required to attend the Initiation Banquet.

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 Ben Myers at bap.committees@utahbap.com.

ADOPT-A-HIGHWAY

The student clubs of the David Eccles School of Business have adopted the stretch of State Street and 300 West. Cleanup projects will be conducted through Beta Alpha Psi, and the Adopt-A-Highway committee will help plan and advertise the service. Committee members will need to be available for periodic meetings to plan and carry out this event multiple times during the semester.

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 AND DINNER COMMITTEE

The meal committees are 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, collects pop-tabs to donate to the Ronald McDonald House, 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.

MENTORING

This opportunity is only available to graduate students.

Current MAcc and MBA students may take advantage of the great leadership opportunity to mentor and tutor undergraduate accounting students. Although the mentoring program is separate from Beta Alpha Psi, it is a great program which we have decided to support as much as we can. Mentoring will also help members and candidates in the MAcc and MBA programs receive service hours that count towards membership.

TUTORING

Year-round tutoring is provided for students in beginning accounting classes, typically ACCTG 2600, ACCTG 3600, 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 Ben Myers 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

VITA (Volunteer Income Tax Assistance) is one of the most important, far-reaching service projects performed by Beta Alpha Psi. This is an excellent opportunity to help low-income students, families, and foreign students complete tax returns for free. **All Beta Alpha Psi candidates are required to participate in this program; however, it does NOT fulfill the committee requirement.**

Frequently asked questions:

Can I do VITA during Fall semester? The IRS will provide a few training sessions at convenient times during the Fall, which is a great way to fulfill the 2-hour VITA requirement for the Fall semester. However, the actual assisting occurs during the tax season, which is Spring semester, and all candidates are required to provide 5 hours of service.

I haven't taken a tax class yet; can I still do VITA? Our VITA officer, Daniel von Wallwitz, and the IRS trainings will guide you along and make sure you know the essential information. Anyone, regardless of tax experience, can and should go to a training session. Once you have been certified, you can serve as a VITA assistant. For those who aren't ready to complete a tax return but would still like to help, there will be positions available as greeters.

I'm from Utah, can I do Foreign Student Training? Foreign Student Training allows native students to help foreign students who are not citizens of the United States complete tax returns. International students are required to file taxes, which can be overwhelming and quite confusing. That's where stellar members of Beta Alpha Psi come in to play!

Why should I spend my time worrying about someone else's finances? Outside of the utopic world of accounting, not everyone understands budgets, incomes, interest, tax credits, etc. As future accountants, we have a valuable skill that should be shared with those in need. Particularly in the foreign student sessions, people are grateful to have someone explain the process and walk them through their returns, making this a very fulfilling service opportunity.

*Additional questions? Pamela Willis, bap.vita@utahbap.com, can help.
Check out VITA on the IRS website to learn more (www.irs.gov).*

MEMBERSHIP TO-DO LIST

- Understand Membership Requirements
- Pay dues to Treasurer David Kingston
 - Checks Payable to “Beta Alpha Psi” or pay via Venmo @UtahBAP
 - \$50 for explorers; \$85 for candidates, \$50 for returning members
 - Dues MUST be paid BEFORE Thursday, September 13th!**
- Print Academic Report (DARS) and submit to advisor, Marci Butterfield at marci.butterfield@eccles.utah.edu or Paige Witt at paige.witt@eccles.utah.edu
- Make sure you have been added to the Beta Alpha Psi session on Canvas (after DARS report is approved)
- 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 Jeff Larsen at bap.membership@utahbap.com

OFFICER CONTACTS

BAP Position	Officer Name	Email Address
Advisor(s)	Marci Butterfield	marci.butterfield@eccles.utah.edu
	Paige Witt	paige.witt@eccles.utah.edu
President	Chad Scott	bap.president@utahbap.com
VP Activities	Jamie Ward/Braden Doxey	bap.activities@utahbap.com
VP Membership	Greg Osborne	bap.membership@utahbap.com
VP Committees	Benjamin Myers	bap.committees@utahbap.com
VP Service	Julie Trujillo	bap.service@utahbap.com
VITA	Daniel von Wallwitz	bap.vita@utahbap.com
Reporting	Caitlin Steed	bap.reporting@utahbap.com
Treasurer	David Kingston	bap.treasurer@utahbap.com
Marketing	Sierra Aquino	bap.marketing@utahbap.com

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