

BETA  
ALPHA  
PSI



# 2022 ANNUAL REPORT

CREATING WHAT IS POSSIBLE



# 2022 BETA ALPHA PSI ANNUAL REPORT

## TABLE OF CONTENTS

- 2** Vision statement, Mission statement, Executive Office staff
- 3** Letter from the President
- 4** Board of Directors
- 5** Chapter Advocates
- 6** Professional Partners
- 9** Mid-Year Meetings
- 10** Annual Meeting
- 12** Awards, Competitions & Recognitions
  - Awards:
    - Outstanding Dean
    - Business Information Professional of the Year (BIPOY)
    - Medal of Inspiration
    - President’s Award
    - KPMG/Bernard J. Milano Lifetime Service Award
    - 2022 Outstanding Faculty Advisor Winners
  - Competitions:
    - Best practices
    - EY Inclusive Leadership Award
    - Gold Challenge
    - Project Run With It
    - VITA Awards
  - Recognitions
    - BAP DEI AICPA Scholarship
    - AICPA Foundation DEI Travel Grant Recipients
    - Award Chapters – Superior and Distinguished
    - Award Sponsors Recognition FY22

To review the Beta Alpha Psi audited financials, visit:  
[bap.org/2022-annual-report](http://bap.org/2022-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, and information systems;
- 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



### CREATING WHAT IS POSSIBLE

The theme I chose for 2021–22 was **Creating What Is Possible**. We began the year in a virtual environment and finished the year gathering in person. The year was also a period of transition. Our students, faculty, professional partners, board members, chapter advocates and staff adapted to the changes and challenges by continuing to be engaged with Beta Alpha Psi's mission of professional development, networking, ethics, and community service. I am so proud of everyone's contributions toward making this year a success.

On behalf of Beta Alpha Psi, I want to thank all our Professional Partners for their generous contributions to providing quality professional sessions for our virtual online sessions, Mid-Year meetings and in-person 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.

To the Beta Alpha Psi Board of Directors and Chapter Advocates, I am proud of what we accomplished together. We held open-minded discussions and debated ideas that we would not have thought possible a few short years ago. Together we addressed and faced the challenges ahead of Beta Alpha Psi and set into motion a plan of action that will keep the organization relevant for years to come.

Your time and dedication spent reviewing our Program for Chapter Activities resulted in a new approach to measure impact by providing a roadmap for our chapters. The revised PCA provides guidance for chapters to expand their reach to new candidates, simplify reporting and increase impact at their business schools and in their local communities.

I wish to thank the Executive Office for all their support in embracing the board's initiatives and making them a reality.

We all worked together by **Creating What is Possible**, and I will forever be proud. I am confident that the future of Beta Alpha Psi is bright and full of possibilities.

It was an honor to serve you all.

A handwritten signature in black ink, appearing to read "Scott McQuillan". The signature is fluid and cursive.

**Scott McQuillan**

President, Beta Alpha Psi, 2021–22

## BOARD OF DIRECTORS – CURRENT



**Scott McQuillan**  
President



**Kimberly Ellison-Taylor**  
President-elect



**Rita Grant**  
Past President



**Barbara Ritter**  
Dean Representative



**Jan Taylor**  
AICPA Liaison



**Pearl Rozenberg**  
Director of  
Global Activities



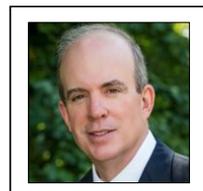
**Raymond Elson**  
Director of  
Administration



**Alicia Fleri**  
At-Large Director for  
Information Systems



**Steven Mezzio**  
At-Large Director  
for Innovation



**Michael Mullen**  
At-Large Director  
for Finance



**Valerie Wendt**  
Professional Partner  
Chair



**Jodi Ryan**  
Professional Partner  
Chair-elect



**McKenzie Gravitt**  
International Alumni  
Representative



**Riley Ramos**  
Professional Partner  
Representative



**Cassy Henderson**  
3rd Year Chapter  
Advocate



**Sandra Cereola**  
3rd Year Chapter  
Advocate

## BOARD OF DIRECTORS – INCOMING



**Mark Myring**  
President-elect



**Lisa Owens-Jackson**  
3rd Year Chapter  
Advocate



**Mark Judd**  
3rd Year Chapter  
Advocate



**Teresa Conover**  
Director of Global  
Activities



**Sridhar Sundaram**  
Dean Representative



**Danielle Bradley**  
At-Large Director,  
Operational Sustainability



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



**Jeremy Carrine**  
Professional Partner  
Chair-elect

## UPDATES FOR THE YEAR:

- ▶ PCA non-hours review and collection of feedback on proposal
- ▶ Executive Graduate Honor outreach and kickoff of the new membership
- ▶ Virtual Mid-year Meeting planning with the Executive Office
- ▶ Chapter Reboot materials for fall 2021
- ▶ Selected Outstanding Faculty Advisors for 2022
- ▶ Annual Meeting planning
- ▶ Update of manuals
- ▶ Selection of new Chapter Advocates
- ▶ Support for chapters navigating a new generation of students and the virtual world

## CHAPTER ADVOCATES – CURRENT

### ■ 3rd Year



**Cassy Henderson**  
Southwest Region



**Sandra Cereola**  
Atlantic Coast Region

### ■ 2nd Year



**Lisa Owens-Jackson**  
Southeast Region



**Mark Judd**  
Western & Northwest  
Regions

### ■ 1st Year



**Jason Stanfield**  
Midwest Region

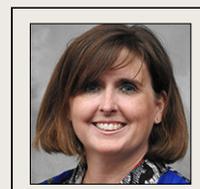


**Fred Ng**  
Oceania Regions



**Rita Grant**  
Rocky Mountain  
& Missouri Valley  
Regions

## CHAPTER ADVOCATES — INCOMING



**Connie McKnight**  
Southwest Region



**Avneet Nagra**  
Atlantic Coast  
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.

## ■ Associations/not-for-profits

- Accounting & Financial Women's Alliance (AFWA)
- AICPA
- American Accounting Association (AAA)
- Association of Government Accountants (AGA)
- CAIA
- CFA Institute
- Educational Foundation for Women in Accounting (EFWA)
- 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

## ■ Professional education/exam providers

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

## ■ Firms and industry

- Aprio
- BDO USA, LLP
- Deloitte LLP
- EY
- Fifth Third Bank
- FloQast
- Grant Thornton LLP
- KPMG LLP
- Moss Adams LLP
- MYOB
- Protiviti
- PwC
- Robert Half
- RSM US LLP
- Wipfli LLP
- Xero

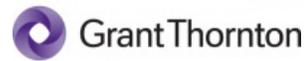
## ■ State societies

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

## ■ Incoming professional partners

- Republic Services
- Skillful.ly
- FICPA
- CA ANZ
- Tipalti

## FIRMS AND INDUSTRY



---

## PROFESSIONAL EDUCATION/EXAM PROVIDERS



## ASSOCIATIONS AND NOT-FOR-PROFITS



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



## STATE SOCIETIES



## INCOMING PROFESSIONAL PARTNERS



# 2022 VIRTUAL MID-YEAR MEETINGS

## ■ HIGHLIGHTS

- **Keynote speakers:**
  - Ryan Kist, LinkedIn
  - Thomas Epperson, InnerWill
  - Aaron Gagnon, Apple
- **817** attendees total
  - 4 virtual meetings
    - Friday, March 11
    - Friday, March 25
    - Wednesday, April 7 (Oceania)
    - Friday, April 8
- Encouraged chapters to submit Chapter Achievements for 2021–22

## 2021–22 ANNUAL RECAP

### ■ Financial Transparency

- FY23 Budget approved by the board.
- Both internal and external audits were conducted and completed between May and July 2022

### ■ BAP Impact for FY22

- BAP chapters conducted:
  - **1,242** Reaching out activities
  - **2,980** Professional activities
  - **828** Service activities
  - **141** chapters held at least 1 Essential Skills session

### ■ Customer/Stakeholders & COVID-19 Response

- Reviewed and updated our Strategic Priorities:
  - Established Task Force Committees to focus on the following initiatives:
    - Value Proposition
      - Expansion beyond AACSB accredited schools
      - Rethinking the Program for Chapter Activities and Reporting Process for Chapters (PCA)
    - Chapter Engagement – Reviewed and revised the PCA and updated the Reporting Intranet to coincide with the newly revised program.

- Community College Outreach – Task force assigned to explore how BAP chapters can conduct outreach to Community College students

### • COVID-19 Response

- Because of continued concern over the coronavirus, the 2022 regional meetings had to be cancelled. Conducted three mid-year meetings where we had up to 1,000 attendees
- Professional Partners provided free webinars and webcasts for candidates and members to access and report hours so that they can maintain their reporting hours.
- Decided to move forward with the planned the in-person 2022 Annual Meeting in Orlando

### ■ BAP/AICPA DEI Grant

- 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.

# 2022 ANNUAL MEETING

■ **Thursday, July 28, 2022, through Saturday, July 30, 2022**

■ **HIGHLIGHTS**

- **650** attendees total
- **26** presentations for Best Practices
- **32** Chapter Operations
- **48** participants for Project Run With It (PRWI)



## ■ Community Impact Day

- **11** Boys & Girls Clubs of Central Florida locations:
  - 9 Literacy Fairs
  - Boys & Girls Clubs Warehouse Cleanup
  - Boys & Girls Clubs Thrift Store Cleanup
- **252** sling bags stuffed with a book and school supplies — donated to the Boys & Girls Clubs of Central Florida
- **1,240** children participated in Literacy Fairs
- **524** volunteers
- **3,020** books donated
- **252** Notes of Inspiration were written for children
- **2,814** school supplies donated
- **\$500** donation made to Rosemont Elementary School
- **67,116** meals were packaged during the Pack Shack Feed the Funnel Party and donated to Second Harvest Food Bank of Central Florida, Boys & Girls Clubs of Central Florida, and University of Central Florida
- **95** Stars of HOPE with encouraging words for the citizens of Ukraine



## AWARDS, COMPEITIONS AND RECOGNITIONS

### OUTSTANDING DEAN

#### Michael Hargis

Dean  
College of Business at the University of  
Central Arkansas

Dr. Michael Hargis (Ph.D., Wayne State University) is the Dean of the College of Business at the University of Central Arkansas and a Professor of Management. He joined the UCA College of Business in fall 2006. Michael has served in a number of different faculty and administrative roles during his tenure at UCA, including Dean, Interim Associate Dean, Residential College Rector, and associate professor in the department of marketing and management. His research has been published in journals such as *Personnel Psychology*, *Journal of Managerial Issues*, *Journal of Vocational Behavior*, *Organizational Development Journal*, and *Human Relations*. Michael serves on the editorial board for the *Journal of Organizational Behavior* and the *Journal of Business and Psychology*. In addition, he serves on several regional and state-level advisory boards. He lives in Conway, AR, with his wife Jessica and their two children, Matthew and Emma.



*"I am honored and humbled to be chosen for this award. UCA's Beta Alpha Psi Theta Lambda chapter upholds the mission of the UCA College of Business by offering students impactful professional development opportunities and by helping students to develop relationships in the business community. They are an outstanding group, and I am proud to support their work."*

— Dean Michael Hargis

## 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

#### Ronald Tilden

Professor Emeritus  
University of Washington Bothell

**Nominated by the** Mu Psi chapter,  
University of Washington Bothell

Professor Ronald Tilden recently retired from the University of Washington Bothell, after a 20-year teaching career. Ronald was instrumental in the establishment, growth and development of the university's accounting program, and was the recipient of the university's Distinguished Teaching Award in 2013.

Ronald helped establish the Mu Psi chapter of Beta Alpha Psi at the University of Washington Bothell in 2012, and was its faculty advisor through 2020. The Mu Psi chapter has earned the distinction of Superior Chapter in each year of its existence, and has participated in every Regional and National Conference since its formation.

Before joining the academic community, Ronald worked for Deloitte, and was the CFO of two prominent technology companies in the Seattle area. His strong industry relationships have contributed to UW Bothell students' outstanding record of internships and career placements.



*"I'd like to thank Beta Alpha Psi, and particularly the Mu Psi chapter for this prestigious award. It comes at the end of a rewarding career and I'm truly humbled to receive it. I've been blessed to have broad exposure to the accounting profession; first in public accounting, then in private industry, and finally in academia. Thinking back over the past five decades, I can truly say that the most professionally rewarding experience I have had has been to participate in the creation and development of the UW Bothell accounting program, the installation of our Beta Alpha Psi chapter there, and the opportunity to help hundreds of our students launch a career in the accounting profession. I'm very proud to have been a CPA for most of my working life, and I know that these students will benefit from that affiliation as well."*

— Ronald Tilden

## Jeffrey S. Sallet

Forensic & Integrity Services Partner  
EY, Forensic & Integrity Services

**Nominated by the** Delta Nu chapter,  
University of Massachusetts Amherst

Jeffrey S. Sallet is a Forensic & Integrity Services partner at Ernst & Young LLP (EY). He serves on the Investigations & Compliance team, with a primary focus on Forensics services, investigation and crisis management. Jeff served as the Associate Deputy Director of the FBI until November 2021. As the FBI's No. 3, he oversaw all FBI personnel, budget, administration and infrastructure/technology. Jeff also oversaw inspection/internal investigations, insider threat programs, integrity and compliance, and diversity/inclusion.



*“While I was humbled and honored to receive this award from Beta Alpha Psi, what truly inspired me about attending the ceremony was looking around the room and seeing the next generation of the accounting profession and being confident there’s a bright future ahead for it.”*

— Jeffrey S. Sallet

## Emily Signorelli

Director  
Brown, Edwards and Company L.L.P.

**Nominated by the** Kappa Phi chapter,  
Marshall University

Emily Signorelli, CPA, CFE, is a Director with Brown, Edwards and Company L.L.P. in Charleston, WV. She has over 13 years of experience in public accounting with a concentration in accounting and assurance services. She serves a diverse client load, which includes manufacturers, retailers, colleges, religious organization, employee benefit plans, and health care providers.

Emily is passionate about recruiting young aspiring accountants into the profession. She has volunteered at numerous events to network and mentor with students, including various Beta Alpha Psi events at Marshall University and West Virginia University.

Emily is a graduate of West Virginia Wesleyan College (B.S. Accounting) and West Virginia University (Master of Professional Accountancy).



*"I am truly humbled to be this year's recipient of the Professional Services award. It's been a pleasure to be involved with the Kappa Phi chapter at Marshall University over the years, and I'm proud and honored to be representing that chapter. Thank you Beta Alpha Psi for this award and for continuing to provide opportunities for our future professionals."*

— Emily Signorelli

# MEDAL OF INSPIRATION

## ■ Sponsored by AICPA since 2008

- The Medal of Inspiration Award is bestowed upon a student who has experienced extreme hardships in his or her life and has demonstrated an unusually high level of success despite that adversity.

### Stephanie Ruiz

Graduate student, University of Miami

Ever since she can remember, Stephanie has had to learn quickly how to survive. Survival would become one of her earliest life skills. Stephanie overcame immense odds and made education one of her top priorities so that she could help her family move away from the difficult circumstances they found themselves in. In pursuing her education and maximizing every available opportunity, Stephanie gained confidence in her academic studies to become her own person.

Her resilience, strength and determination moved her forward to where she is today. She has completed internships with PwC and Deloitte where she has received full-time job offers. She has also been accepted into the Master of Taxation program at the University of Miami and is planning to sit for the CPA exam in the future.



*“Stephanie Ruiz has shown true perseverance and determination throughout her life. Working diligently in the face of adversity to make a better life for herself. Her story and the stories of others before her are the reason the Medal of Inspiration Award exists.”*

— **Scott McQuillan**  
Board of Directors President  
Beta Alpha Psi

# PRESIDENT'S AWARD

- The President's award is given out annually. Each year the current Beta Alpha Psi President recognizes one individual who goes above and beyond their duties to the organization.

## Valerie Wendt

Gleim Publications  
CPA Product Manager

Valerie Wendt is the CPA Product Manager for Gleim Publications based in Gainesville, FL. Before joining Gleim, Valerie was the Vice President – Product Development with Surgent Professional Education based in the Philadelphia area, helping to oversee the CPA Review and Enrolled Agent product lines.

Valerie is a graduate of Saint Leo University in Tampa, FL, with a degree in Business Administration and Management Information Systems as well as holds a Certificate in Project Management from Villanova University. She is a past professional affiliate member of the Florida Institute of Certified Public Accountants and is the past Secretary and Vice-President of the American Professional Accounting Certification Providers Association. Valerie also served as the Past Chair for the Professional Partners group for the national organization of Beta Alpha Psi and served on its executive board.



*“What an incredible honor to be awarded the 2022 Beta Alpha Psi President’s Award. To say I was surprised and humbled is an understatement. It was even more special to receive this award surrounded by friends, partners & faculty at our first in-person conference in three years! Beta Alpha Psi has been a part of my professional life for the past 20 years and the relationships I have gained have certainly helped in my professional and personal growth. It’s been my pleasure to serve and support this amazing organization. Thank you Beta Alpha Psi for all that you are; I’m excited to see what is to come!”*

— Valerie Wendt

## Rita Grant

Associate Professor  
Grand Valley State University

Past President, Chapter Advocate,  
Rocky Mountain & Missouri Valley Regions

Rita Grant's experience with BAP started as a graduate student at Michigan State University. Rita was a mathematics major at a small liberal art college and came to MSU to get an MBA with a concentration in accounting. Rita is a first-generation college student and knew little about her intended career as a CPA. A professor told her BAP would help her get a job, develop Rita's network and acquire some work-ready skills. A few weeks after joining, she changed her career goal and switched to the doctoral program with the goal of becoming a professor.

Rita's first professorial job was at the University of Georgia. When her husband finished law school, they moved to his hometown of Grand Rapids, MI, where she took a job at Grand Valley State University. She became the advisor of BAP. Later, she joined the board of BAP, first as Director of Global Activities and a few years later as President.



*"I am so honored to receive the KPMG Bernie Milano Service award. I can honestly say that I have benefited more from my long association than I have given. I think this is true for most of us who are involved with BAP."*

— Rita Grant

# 2022 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.

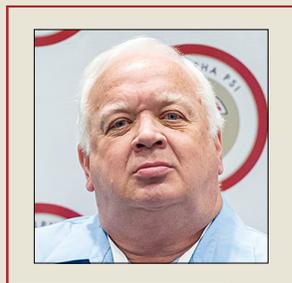


**Xiaoyan Cheng**

University of Nebraska at Omaha,  
Gamma Kappa chapter

*"I am so honored to have been considered for this recognition. Serving as the faculty advisor for BAP is truly one of the best experiences in my professional career. This recognition will definitely be a booster for me moving forward in promoting the benefits and values for BAP students. Thank you for all you for making my work as faculty advisor so rich and so rewarding."*

— Xiaoyan Cheng



**Eddie Nabors**

University of Alabama at  
Birmingham, Delta Chi chapter

*"To be recognized by an organization that means so much to me and to thousands of students and faculty is very special to me. Beta Alpha Psi was a very important part of my college experience and my goal is for my students to benefit from membership, as I did. At UAB, we have been blessed with outstanding student leaders that make the role of Faculty Advisor so very rewarding. I receive so much satisfaction from watching them grow into successful young professionals that want to come back to campus to help current students. I am so grateful for all of the students that are responsible for this recognition and to the leadership of Beta Alpha Psi for making a difference in the lives of so many. I hope this award signifies that I have made a difference in the lives of my students."*

— Eddie Nabors



### **Benjamin Silliman**

St. John's University Staten  
Island, Kappa Zeta chapter

*"This is one of the greatest achievements in my career in that I want to see the fine members of our Beta Alpha Psi chapter not only succeed, but also to appreciate working in a dynamic and diverse workplace that requires not only accounting intelligence, but also respects different ideas, cultures, and values."*

— Benjamin Silliman



### **Thomas Hayes**

University of Arkansas,  
Alpha Iota chapter

*"I'm deeply humbled and honored to receive this award. Winning the outstanding advisor award tells me that I'm making a positive impact in the lives of my students, and as an educator, that means everything."*

— Thomas Hayes

# BEST PRACTICES

## ■ Sponsored by Deloitte since 2001

- The Best Practices competitions give members a chance to present their expertise on one of the topics for the year.
- The Best Practices topics for 2022 included: The Art of Change, The Art of Engagement and The Art of Teaming
- Each of the winning teams from the nine regions competed virtually for their winning topic. All Mid-Year first-place teams were invited to present in person at the 2022 Annual Meeting in Orlando, FL.

### 2022 ANNUAL MEETING WINNERS

#### THE ART OF CHANGE

<b>1st Place:</b>	<b>University of Arkansas</b>	<b>Alpha Iota Chapter</b>
2nd Place:	University at Buffalo	Zeta Theta Chapter
3rd Place:	California State University Fullerton	Delta Beta Chapter

#### THE ART OF ENGAGEMENT

<b>1st Place:</b>	<b>University of Central Arkansas</b>	<b>Theta Lambda Chapter</b>
2nd Place:	University of Technology Sydney	Upsilon Tau Sigma Chapter
3rd Place:	Iowa State University	Iota Beta Chapter

#### THE ART OF TEAMING

<b>1st Place:</b>	<b>University of Technology Sydney</b>	<b>Upsilon Tau Sigma Chapter</b>
2nd Place:	Utah Valley University	Mu Pi Chapter
3rd Place:	Portland State University	Epsilon 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 are those who are experienced 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?

### THE FINAL ROUND WINNERS FOR THE 2022 EY INCLUSIVE LEADERSHIP AWARDS:

1st Place:	Western Kentucky University	Eta Omicron Chapter
2nd Place:	The University of Sydney	Lambda Omega Chapter
3rd Place:	University of Massachusetts Amherst	Delta Nu Chapter
3rd Place:	University of Washington Bothell	Mu Psi Chapter
3rd Place:	Stonehill College	Mu Omega 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:

University of Nevada Las Vegas	Theta Omicron Chapter
University of Technology Sydney	Upsilon Tau Sigma Chapter
The University of Sydney	Lambda Omega Chapter
Florida International University	Eta Iota Chapter
University of South Florida	Delta Gamma Chapter

# PROJECT RUN WITH IT

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

- Project Run With It involved 48 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 work in virtual 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 Elizabeth Dollar from Moss Adams LLP.

WINNERS

## 2022 – NOT FOR PROFIT – ALPFA – ASSOCIATION OF LATINO PROFESSIONALS FOR AMERICA

### Team A-3

<b>Rob Barnes</b>	Idaho State University	Eta Lambda Chapter
<b>Christian Habkouk</b>	The University of Sydney	Lambda Omega Chapter
<b>Jingwen Ou</b>	Ithaca College	Mu Alpha Chapter
<b>Clare Bargender</b>	University of Wisconsin La Crosse	Iota Upsilon Chapter

### Team B-5

<b>Michael Cunada</b>	University of Central Florida	Epsilon Gamma Chapter
<b>Elizabeth Pendlebury</b>	University of South Florida	Delta Gamma Chapter
<b>Kaysten Thomas</b>	Western Kentucky University	Eta Omicron Chapter



## VITA AWARDS

### ■ Sponsored by IRS

- The Volunteer Income Tax Assistance (VITA) Program offers free tax help to people who make \$50,000 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

Creighton University	Alpha Nu Chapter
San Francisco State University	Beta Chi Chapter
Murray State University	Epsilon Nu Chapter
Boise State University	Zeta Psi Chapter
Valdosta State University	Mu Zeta Chapter
University of North Georgia	Nu Gamma Chapter
Washington University in St. Louis	Nu Iota Chapter

# RECOGNITION

## BAP 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 BAP to help broaden our membership inclusion of underrepresented minority students and also offer these students the opportunity to engage and network with other BAP students at our 2022 Annual Meeting in Orlando, FL.

## AICPA FOUNDATION DEI TRAVEL GRANT RECIPIENTS FOR 2022 ANNUAL MEETING

- **16 recipients** at \$500 each; total of \$8,000 awarded

## AWARD CHAPTERS



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

- **Gold – 5**
- **Superior – 113**
- **Distinguished – 41**

### ■ **Dean’s List Award Winners for 2022**

- 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 2022 Annual Meeting had the opportunity to receive a travel stipend from Beta Alpha Psi.

### **WINNERS:**

<b>Samuel Villareal</b>	The University of Texas Rio Grande Valley	Petitioning Chapter
<b>Grace Lau</b>	University of California, Irvine	Nu Pi Chapter

# AWARD CHAPTERS

## SUPERIOR CHAPTERS

School Name	Chapters Name
Appalachian State University	Epsilon Kappa
Auburn University	Epsilon Omicron
Boise State University	Zeta Psi
Bowling Green State University	Alpha Upsilon
Brigham Young University	Gamma Alpha
California State University East Bay	Epsilon Psi
California State University Fresno	Gamma Omicron
California State University Northridge	Epsilon Chi
Case Western Reserve University	Pi
Clemson University	Zeta Rho
Colorado State University	Gamma Tau
Deakin University	Xi Kappa
Eastern Illinois University	Theta Omega
Elon University	Lambda Xi
Fairfield University	Iota Psi
Florida Atlantic University	Eta Tau
Florida Gulf Coast University	Mu Lambda
Florida International University	Eta Iota
Florida State University	Beta Rho
Georgia Southern University	Zeta Delta

School Name	Chapters Name
Georgia State University	Beta Mu
Hofstra University	Delta Pi
Iowa State University	Iota Beta
Ithaca College	Mu Alpha
Jacksonville State University	Nu Phi
Kennesaw State University	Iota Tau
Kent State University	Beta Psi
Lamar University	Zeta Tau
Long Island University Post	Kappa Omicron
Loyola University Maryland	Eta Upsilon
Manhattan College	Lambda Pi
Marshall University	Kappa Phi
Middle Tennessee State University	Zeta Gamma
Minnesota State University Mankato	Nu Chi
Mississippi State University	Beta Kappa
Missouri State University	Theta Pi
Monash University	Xi Epsilon
Murray State University	Epsilon Nu
North Carolina A&T State University	Zeta Sigma
Northern Arizona University	Delta Upsilon
Ohio University	Alpha Kappa

## AWARD CHAPTERS (CONTINUED)

### SUPERIOR CHAPTERS

School Name	Chapters Name
Oregon State University	Epsilon
Quinnipiac University	Nu Alpha
Robert Morris University	Xi Delta
Rutgers University New Brunswick	Theta Mu
Salisbury University	Iota Pi
Sam Houston State University	Kappa Mu
San Francisco State University	Beta Chi
Seattle University	Delta Eta
Southeast Missouri State University	Mu Xi
Southern Illinois University at Carbondale	Gamma Zeta
St. John's University Staten Island	Kappa Zeta
Stonehill College	Mu Omega
SUNY Oswego	Lambda Zeta
Temple University	Alpha Phi
Tennessee Tech University	Zeta Phi
Texas State University	Kappa Eta
The Pennsylvania State University	Beta Theta
The University of Akron	Gamma Eta
The University of Alabama	Alpha Beta
The University of Melbourne	Xi Lambda

School Name	Chapters Name
The University of Memphis	Gamma Chi
The University of Southern Mississippi	Zeta Mu
The University of Sydney	Lambda Omega
The University of Tampa	Lambda Beta
Truman State University	Kappa Nu
University at Buffalo	Zeta Theta
University of Arkansas	Alpha Iota
University of Arkansas Fort Smith	Nu Eta
University of Central Arkansas	Theta Lambda
University of Central Florida	Epsilon Gamma
University of Florida	Upsilon
University of Hawaii Manoa	Delta Theta
University of Illinois	Alpha
University of Iowa	Alpha Pi
University of Kentucky	Alpha Mu
University of Massachusetts Amherst	Delta Nu
University of Massachusetts Dartmouth	Mu Phi
University of Mississippi	Alpha Theta
University of Missouri St. Louis	Gamma Psi
University of Nebraska at Omaha	Gamma Kappa

## SUPERIOR CHAPTERS

School Name	Chapters Name
University of Nevada Las Vegas	Theta Omicron
University of Nevada Reno	Zeta Iota
University of North Alabama	Xi Zeta
University of North Carolina at Charlotte	Eta Alpha
University of North Carolina at Greensboro	Zeta Chi
University of North Florida	Xi Eta
University of North Georgia	Nu Gamma
University of Northern Colorado	Theta Psi
University of South Carolina Upstate	Xi Alpha
University of South Dakota	Theta Upsilon
University of South Florida	Delta Gamma
University of South Florida St. Petersburg	Mu Gamma
University of Southern California	Iota
University of Southern Indiana	Lambda Mu
University of Technology Sydney	Upsilon Tau Sigma

School Name	Chapters Name
University of Tennessee at Knoxville	Alpha Lambda
University of Texas at El Paso	Theta Beta
University of Texas at Tyler	Mu Kappa
University of Utah	Epsilon Xi
University of Washington	Delta
University of Washington Bothell	Mu Psi
University of West Florida	Iota Phi
University of Wisconsin Oshkosh	Iota Rho
Utah State University	Delta Omega
Valdosta State University	Mu Zeta
Virginia Commonwealth University	Epsilon Zeta
Washington State University	Delta Epsilon
Washington State University Vancouver	Nu Theta
West Chester University	Nu Zeta
Western Illinois University	Zeta Beta
Western Kentucky University	Eta Omicron
Youngstown State University	Kappa Xi

## AWARD CHAPTERS (CONTINUED)

### DISTINGUISHED CHAPTERS

School Name	Chapters Name
Arizona State University	Beta Tau
Auburn University at Montgomery	Xi Gamma
Bentley University	Theta Gamma
Bradley University	Zeta Lambda
Central Michigan University	Eta Epsilon
Creighton University	Alpha Nu
Eastern Washington University	Delta Sigma
Fairleigh Dickinson University	Nu Sigma
Fort Lewis College	Theta Nu
Louisiana State University	Phi
Louisiana Tech University	Alpha Chi
Marist College	Lambda Eta
Marquette University	Psi
New York University	Mu
Nicholls State University	Iota Sigma
Ohio Northern University	Mu Delta
Pace University	Iota Lambda
Rowan University	Xi Theta
San Jose State University	Gamma Xi
Stephen F. Austin State University	Epsilon Mu
The University of Texas Rio Grande Valley	Petitioning

School Name	Chapters Name
University of Alabama at Birmingham	Delta Chi
University of Georgia	Beta Upsilon
University of Houston	Gamma Delta
University of Houston Clear Lake	Zeta Upsilon
University of Idaho	Iota Gamma
University of Louisiana at Lafayette	Kappa Theta
University of Louisiana at Monroe	Eta Sigma
University of Michigan Dearborn	Kappa Sigma
University of New Orleans	Gamma Sigma
University of Notre Dame	Beta Sigma
University of San Diego	Zeta Kappa
University of Scranton	Nu Kappa
University of Tennessee at Chattanooga	Eta Kappa
University of Waikato	The Waikato
University of Wisconsin Whitewater	Epsilon Rho
Washington University in St. Louis	Nu Iota
Western Michigan University	Gamma Rho
Western Washington University	Theta Phi
Wichita State University	Epsilon Tau
Widener University	Kappa Iota

# AWARDS SPONSORS RECOGNITION FY22

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 \$12,500 to Gold status chapters and \$54,000 to Superior status chapters. The Foundation also contributed over \$20,000 for the Faculty Advisor reception at the 2022 annual meeting in Orlando, FL, and donated \$30,000 for the Annual Meeting Community Impact Day. In total, the Foundation donated \$100,000 for award-status chapters and Beta Alpha Psi will carry over \$33,500 for FY23.



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



- Deloitte awarded \$30,000 to chapters participating in the Best Practices competition on a regional and international level.



- 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 \$7,000 to the Project Run With It winning teams and contributed over \$20,000 for program expenses.



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



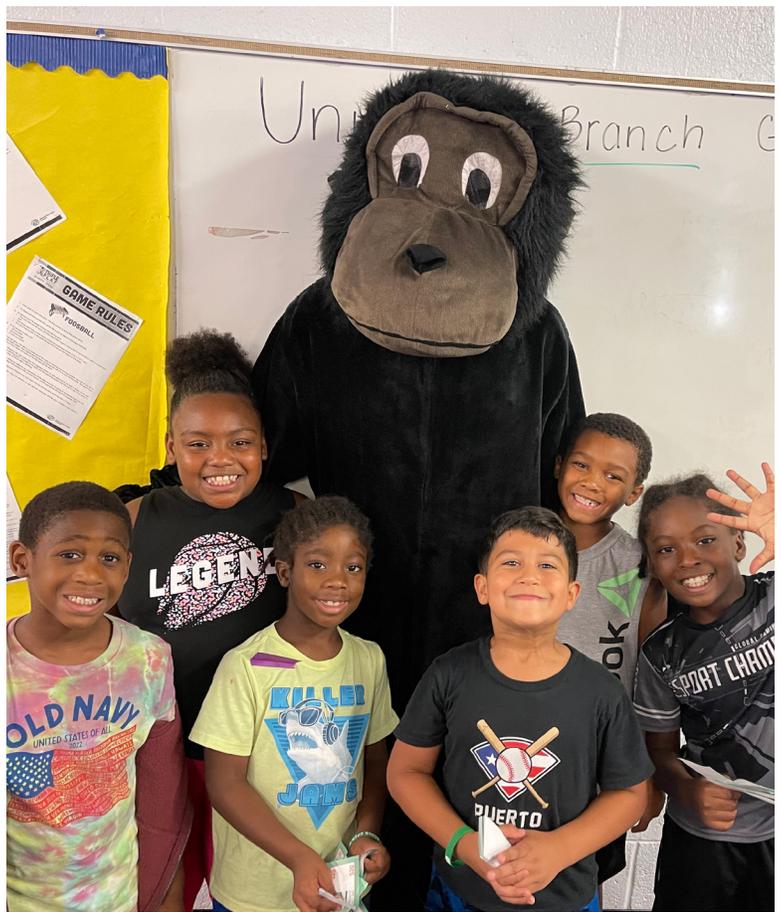
- The AICPA awarded \$5,000 to the Medal of Inspiration award recipient.



- The AICPA Foundation DEI grant awarded \$8,000 for a total of 16 students to attend the annual meeting.
- The AICPA Foundation DEI grant awarded \$3,375 in membership grants to 45 students.



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





BETA  
ALPHA  
PSI



## BETA ALPHA PSI

220 Leigh Farm Road, Durham, NC 27707–8110

**Phone:** 919.402.4044

**Email:** [bap@bap.org](mailto:bap@bap.org) | **Website:** [bap.org](http://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)