2019 BETA ALPHA PSI ANNUAL REPORT

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36 Past Presidents

To review the Beta Alpha Psi audited financials, visit: bap.org/2019-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.

BETA ALPHA PSI EXECUTIVE OFFICE STAFF
Margaret Fiorentino — Executive Director
Lisa Wicker — Manager, Chapter Services
Lauren Peck — Manager, Marketing
What an amazing year it’s been for BAP! I was so honored to be president of this wonderful organization during its 100th year anniversary. My theme was “Inspiring Future Leaders to Leave a Legacy of Excellence.” I hoped to plant a seed in the minds of BAP stakeholders to think about what you can do for others. Our tagline became “Why do you plant a tree?” You plant a tree now so someone else will have shade in the future. That’s a way to leave your legacy.

Leaving a Legacy and the Anniversary Timeline

That concept of planting a tree led to the launch of our 100th Anniversary Tree Timeline. What a tremendous place to see the roots and branches of the BAP tree! From significant chapter events, competitions and awards, our Professional Partners, and the history of BAP in interviews and photos, every branch of each tree is a treasure trove showing the excellence of this organization!

We also spent several years documenting the history of the organization. This amazing video can be used by chapters everywhere to showcase BAP and introduce potential new members to the legacy of the organization.

Another way we recognized the legacy of BAP is through the KPMG/Bernard J. Milano Lifetime Achievement Award. This award celebrates stakeholders of BAP who have left a legacy through meaningful and sustained service. This year we recognized Jan Taylor Morris of Sam Houston State University and Blane Ruschak of KPMG.

100th Anniversary Celebration at the Annual Meeting

Members from all over the world gathered at the Annual Meeting in Chicago, IL in August. This was a tremendous event with over 1,300 attendees. The professional sessions were top notch, the competitions were fierce, and the keynote speakers left us with messages that continue to inspire those in attendance.

A special thank you should go out to those who participated in our Annual Meeting by sponsoring competitions or awards: Deloitte, EY, KPMG, Moss Adams, Grant Thornton, RSM US, IMA and AICPA. We couldn’t do this without you.

The success of this organization goes beyond academics. Our Community Service Day sponsored by KPMG LLP and the KPMG Foundation gave over 900 volunteers a meaningful way to make an impact on the local community. Thousands of school supply items and almost 1,900 books were donated by meeting attendees to go to children across the city, in connection with Boys and Girls Clubs of Chicago. New this year was another Community Service Day partner, The Pack Shack. This event used the Feed the Funnel program to generate meal packages for those with food insecurity. It was wild and noisy and there was an amazing amount of hair nets in place, but by the end of the activity, volunteers generated over 100,000 meals. What a day for all involved!

The Future Expansion of Beta Alpha Psi

As part of our continued effort to Widen the Reach of BAP and to expand membership to finance and information systems as well as accounting majors, we brought on three new board members for Directors at Large focused on Finance, Information Systems and Innovation. These directors are already looking at how BAP can be more engaged with attracting members from across our three areas of emphasis. We’re celebrating our history but also looking forward to our future in the next century. Our new 2nd Century Task Force has been charged with looking at what it means in the future to be a financial services professional, and how BAP can be part of that. Our three new board members hit the ground running as members of this forward-thinking task force.

We currently have 12,000 candidates and members! This year, there were four installations of new US-based chapters in the Atlantic Coast, Missouri Valley and Southeast regions, and two new chapters in Melbourne, Australia, part of our Oceania region. Just as exciting, we have our first petitioning chapter from Saudi Arabia.
Our International Alumni Representatives were hard at work as well during the past year. They not only helped streamline the Deloitte Best Practices competition judging operations during the year, they also went live at the Annual Meeting in Chicago with the BAP Alumni Network. This excellent platform on the BAP website helps connect current members and alumni to each other across the globe. Members of this platform are able to grow their professional network with other members and alumni they have met at regional and annual meetings. This platform also allows BAP to increase our engagement with current members and alumni.

This past May, we introduced the Beta Alpha Psi Lifetime Member digital badge. The digital badge contains metadata describing each members’ qualifications and credentials, including how they earned them to verify their membership of Beta Alpha Psi. We hope our members continue to take advantage of this new feature and enjoy the convenience and professional recognition afforded by our digital badge program.

Throughout this report, you will find that Beta Alpha Psi is proud of the members, alumni, faculty advisors, Professional Partners, Board of Directors, Chapter Advocates and every volunteer that contributes to the success of this organization. A special thank you to everyone – especially to those that sponsor one of our competitions or awards. We couldn’t do this without any of you.

It seems like our 100th Anniversary year flew by in a blur! I was privileged to work with such outstanding people – from the Executive Office to the Board of Directors, with students, faculty and Professional Partners. We accomplished so much and have so much to look forward to. I’m proud to have been a part of that, and to help continue planting trees and provide shade for the future of our profession.

Alexandra L. Miller
Board President 2018–2019
Dear friends,

**100 years!** What an amazing achievement for an organization that started 100 years ago, with one faculty advisor and three students who had a vision. A vision to provide high-achieving students the opportunity to develop themselves and their peers. Beta Alpha Psi has endured a stock market crash, the great depression, World War II and, along with our country, bore witness to the progression of gender equality and the civil rights movement.

Over the past year, I have been able to research and reflect upon the history of Beta Alpha Psi and all the achievements we have attained as an organization. I read about the changing times, technology and chapter programs, but two things never changed: belief and dedication. The belief in the quality of our students and the dedication of our board, faculty advisors, professional partners, staff and most importantly our volunteers.

**Belief** — I still get awestruck by the quality of our student members. Whether it be watching a presentation at a regional or annual meeting or just speaking with them in person or on the phone. Their poise and maturity are an example that our mission matters. Beta Alpha Psi students exemplify professional development, service and leadership. Beta Alpha Psi students are proof that the future is bright in both the financial services professions and the world. The founding members believed that Beta Alpha Psi’s members were the best and the brightest. This has not changed.

**Dedication** — The dedication of our board members, faculty advisors, professional partners and our countless volunteers is remarkable. I cannot thank the individuals enough who have come back year after year to contribute their knowledge, experience and tireless enthusiasm to keep BAP’s mission strong and relevant.

I am humbled to serve this wonderful organization for the past 13 years and as the Executive Director for the past 6 years. I am honored to work alongside with the students and professionals who contribute so much to Beta Alpha Psi.

As we enter our second century, I have a renewed commitment to the vision of our founding members to carry forth the Legacy of Excellence to a bright and fulfilling future for Beta Alpha Psi.

Respectfully,

Margaret Fiorentino
Executive Director, Beta Alpha Psi
**BOARD OF DIRECTORS**

**UPDATES FOR THE YEAR:**

- **Mission and growth**
  - Increased international presence by installing chapters at Deakin University and University of Melbourne
  - Increased domestic presence by installing 4 US chapters and 3 petitioning chapters
  - Board approved a new Alumni Network that launched August 2019

- **Governance**
  - Second Century Task Force — Established to address current challenges and keeping BAP relevant for the next 100 years
  - Alumni Task Force — Established to increase engagement with our BAP alumni (300,000+)
  - Added three board At-Large positions focusing on Finance, Innovation and Information Systems

- **Financial transparency**
  - FY20 Budget approved by the board
  - Drafted a five-year budget which the board will review in January 2020

- **Customer/stakeholders**
  - Continued to message our strategic planning process and goals:
    - Increase Gratitude
    - Widening the Reach — Think Globally, Act Locally
    - Innovate Knowledge Sharing/Learn by Experience
  - Continued to provide relevant communication to our members via email (BAP Bulletins, BAP Alerts and the BAP Newsletters)

- **100th anniversary**
  - Launched the 100th Anniversary Tree Timeline — January 2019
  - Celebrated the 100th Anniversary during the Student Reception at the Annual Meeting held in Chicago, IL.
  - BAP promotional video launched at the Annual Meeting in August 2019

- **Internal Business Processes**
  - Began issuing digital badges to our members in May 2019
  - Increased registration fees for the regional and annual meetings
  - Increased membership dues that began July 2019
CHAPTER ADVOCATES

UPDATES FOR THE YEAR:

- Installed 6 new chapters, including 2 international chapters
- Conducted 9 regional meetings with total attendance of over 1,700 attendees
- Partnered with the Professional Partners and presented a restructuring of the regional meeting times which was adopted by the Board of Directors
- Conducted appeal hearings for the newly adopted Appeals Policy on chapter awards
- Conducted faculty roundtable discussions and compiled data for the 2nd-century task force
- Conducted new faculty, PCA and regional meeting workshops at the Annual Meeting
- Selected the Outstanding Faculty Advisors for recognition

CHAPTER ADVOCATES — CURRENT

- 3rd Year
  - Arthur Reed
    - Atlantic Coast Region
  - Kelly Noe, Ph.D.
    - Southwest Region

- 2nd Year
  - Sarah Bee
    - Western and Northwest Regions
  - Eddie Nabors
    - Southeast Region

- 1st Year
  - Marci Butterfield
    - Rocky Mountain and Missouri Valley Regions
  - Dori Danko
    - Midwest Region
  - Julie Harrison, Ph.D.
    - Oceania Region

CHAPTER ADVOCATES — INCOMING

- Sandra Cereola, Ph.D.
  - Atlantic Coast Region
- Cassy Henderson, Ph.D.
  - Southwest Region
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 regional and annual meetings each year. These representatives use their professional networks to secure speakers for these meetings or deliver their own 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.

- **Firms and industry**
  - BDO USA LLP
  - Chevron Corporation
  - Deloitte LLP
  - EY
  - Fifth Third Bank
  - Grant Thornton LLP
  - KPMG LLP
  - Moss Adams LLP
  - Protiviti
  - PwC LLP
  - Robert Half
  - RSM US LLP
  - Wipfli LLP
  - Xero

- **Associations/not-for-profits**
  - Accounting & Financial Women’s Alliance (AFWA)
  - American Institute of CPAs® (AICPA)
  - American Accounting Association (AAA)
  - Association of Government Accountants (AGA)
  - Center for Audit Quality (CAQ)
  - Graduate Management Admission Council (GMAC)
  - International Association for Accounting Education and Research (IAAER)
  - Institute of Chartered Accountants in England and Wales (ICAEW)
  - The Institute of Internal Auditors (IIA)
  - Institute of Management Accountants (IMA)
  - NASBA Center for the Public Trust

- **Professional education/exam providers**
  - Becker Professional Education
  - Roger CPA UWorld
  - Surgent CPA Review
  - Wiley CPAexcel

- **State societies**
  - California Society of CPAs
  - Illinois CPA Society
  - Indiana CPA Society
  - Kansas Society of CPAs
  - Maryland Association of CPAs (MACPA)
  - Texas Society of CPAs
  - Washington Society of CPAs
Updates for the year

- Increased PP Exposure
  - On BAP social media
  - #ProfessionalPartnerTuesday, a weekly promotion spotlight
- Instagram: gained 257 followers from January to August
- Facebook: gained 165 followers from January to August
- Twitter: gained 21 followers from January to August
- Consistent talking points for all partners and BAP Board when conducting outreach.

- Updated Best Practices judging
  - In an effort to provide students more feedback after their Best Practices presentations, the Professional Partners implemented a new judging rubric that will go live at the 2020 regional meetings.

- 2019 Annual Meeting presentation updates:
  - Tracked a baseline of presentation topics:
    - Accounting: 7
    - Finance: 2
    - Information Systems: 4
    - Essential Skills: 9
  - Increased CPE eligible sessions for professors.
    Twenty of the 22 PP hosted sessions were eligible for CPE. Held a session hosted by the AICPA for the Data Analytics Executive Certificate Program for 98 of the attending faculty advisors.

- Expanded the reach with two new Professional Partner organizations:
  - Wipfli LLP
  - Gleim Exam Prep
1919

- **Feb. 12, 1919**: First members were inducted at the University of Illinois

1920–40

- Number of chapters installed: 15
- **1923**: Articles of Incorporation filed in state of Illinois
- **1929**: 10 chapters installed to date
- **1937**: First African American member initiated

1941–60

- Number of chapters installed: 28
- **1950**: Beta Alpha Psi constitution was amended to include eligible women and minority students as members
- **1950**: First female member initiated
- **1951**: Rating Plan for chapter activities established

1961–80

- Number of chapters installed: 87
- **1966–2001**: Thomas J. Burns National Student Seminar
- **1969**: Outstanding Faculty Advisor award established (in memory of Richard S. Claire by the Andersen Foundation)
- **1969**: First Annual Meeting held in South Bend, IN
- **1974**: Accountant of the Year award established (renamed Business Information Professional of the Year in 2000)
- **1974**: National Advisory Forum was organized (now known as Professional Partners)
- **1975**: National Council (now the International Board of Directors) approved three categories of chapter recognition: Superior, Excellent and Meritorious
- **1979**: Superior and Distinguished award status established

1981–1999

- Number of chapters installed: 90
- **1981**: National Advisory Forum established the Beta Alpha Psi Associates Program (introduced an organized source of financial support for BAP projects)
- **1999**: Beta Alpha Psi opened up membership to finance and information systems majors
- **1999**: Community Service Day established
2000–19

- Number of chapters installed: 99
- **2000s:** Best Practices, Ethics award, Inclusive Leadership award, Gold Challenge, Project Run With It, Medal of Inspiration, KPMG/ Bernard J. Milano Lifetime Service Award, and Outstanding Dean award were established. T.J. Burns Undergraduate and Graduate Case Seminar were combined.
- **2013:** Beta Alpha Psi International Day of Literacy established
- **2019:** Celebrated 100th anniversary in Chicago, IL, for the Annual Meeting!
- **2019:** Installed the 333rd chapter

FUTURE (SECOND CENTURY)

- **Digital badge**
  - Began issuing digital badges in May 2019 to help to share that they are a member on social media. Employers will notice these badges.
- **Alumni Network**
  - Launched in August 2019, it is an excellent way for Beta Alpha Psi initiated members and alumni to connect and network across the country and world.
- **Task Force**
  - As Beta Alpha Psi (BAP) moves into its second century of existence, certain challenges exist related to growth and expansion.

**Task Force members:**
- Paul Wiese, Surgent CPA Review
- Alicia Fleri, Xero
- Merle Hopkins, University of Southern California
- Steven Mezzio, Pace University
- Michael Mullen, Stonehill College
- Ryan Hirsch, formerly with NASBA Center for the Public Trust, now with Surgent CPA Review
WHERE WE ARE AND WHERE WE WANT TO GO

EXPANSION IN 2019

- **6 chapters** installed in FY 2019
  - Rowan University, Xi Theta — Nov. 15, 2018
  - University of North Florida, Xi Eta — April 5, 2019
  - Ramapo College of New Jersey, Xi Iota — April 23, 2019
  - Drake University, Gamma Nu — reinstalled April 30, 2019
  - Deakin University, Xi Kappa — May 2, 2019
  - The University of Melbourne, Xi Lambda — May 3, 2019

- **3 new petitioning chapters** for 2018–19
  - The Citadel (Southeast) — October 2018
  - Simmons University (Atlantic Coast) — May 2019
  - Troy University (Southeast) — May 2019

- **319 active chapters**

- Recently approved a petition for a chapter at King Abdulaziz University in Saudi Arabia

OCEANIA REGION UPDATE

- **5 active chapters in Australia**

- **4 active chapters in New Zealand**

- **2 chapters were installed** in Australia in 2019 — Deakin University and the University of Melbourne
HIGHLIGHTS

- **1,790** attendees total
- **177** total presentations for Best Practices (Southeast 25, Northwest 17, Atlantic Coast 30, Midwest 20, Western 23, Rocky Mountain 12, Southwest 17, Missouri Valley 16 and Oceania 17)
- **110** total presentations for Chapter Operations (Southeast 20, Northwest 14, Atlantic Coast 13, Midwest 20, Western 11, Rocky Mountain 8, Southwest 12 and Missouri Valley 12)
- **U.S. Service Activity:** This year, BAP partnered with Foundation for Hospital Art. The mission of this organization is to give comfort and hope to those who suffer in hospitals by providing artwork at no cost to hospitals. Our students and faculty advisors loved this service project at each of the regional meetings! There were consistently adults and students working on the project. All canvases were donated to various children’s hospitals that participate in Foundation for Hospital Art.

- **Oceania Service Activity:** The community event was held at CERES, Centre for Education and Research in Environmental Strategies. This is a not-for-profit community based organic garden that provides holistic workshops in sustainability. The students were involved in numerous activities on the day including the planting of seeds, harvesting produce, preparing the soil for planting and composting, as well as making their own lunch with the produce that was harvested. The produce that farmers grow at CERES is used to generate income that is reinvested in the local community.
CHICAGO, IL

Highlights

- **1,327** attendees total
- **27** presentations for Best Practices
- **66** presentations for Chapter Operations
- **95** participants for Project Run With It (PRWI)

Community Service Day

- **7** locations:
  - Ada S. McKinley Community Services
  - Erie Neighborhood House
  - HelloBaby
  - HOPE Excel Reaching the World Academy
  - Leaning Tower YMCA
  - St. Nicholas Cathedral School
  - Youth Crossroads
- **200** backpacks stuffed and donated to the Gary Comer Youth Center in Chicago
- **794** children participated
- **906** volunteers
- **1,847** books donated
- **2,000** Notes of Inspiration were written and given to Back 2 School Illinois
- Thousands of school supplies donated
- **103,680** meals were packaged during Pack Shack Funnel Party
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**

**Katie Terrell** — Adjunct Professor of Accounting, University of Arkansas

**Nominated by** — University of Arkansas, Alpha Iota Chapter

- Katie L. Terrell is a lecturer at the University of Arkansas. She has also taught students around the world, including in Soochow University (Suzhou, China); the University College Dublin (Ireland); and Duoc UC, a branch of the Catholic University of Chile (Vina del Mar, Chile). She is a member of the American Accounting Association and has published a Statement on Management Accounting for the Institute of Management Accountants on managing organizational change in operational change initiatives. She has recently been recognized for her innovative teaching by being the recipient of the Mark Chain/FSA Teaching Award for innovative graduate-level accounting teaching practices in 2016. She has worked with Tyson Foods, where she held various information system roles, focusing on business analysis, project management for ERP implementations and upgrades, and organizational change management.

“Beta Alpha Psi has had such a tremendous influence on so many of my students. It’s been amazing to watch my students thrive in this environment as they learn about what it takes to be involved in their communities — as professionals, through providing service, and by building connections. I am so thrilled and honored to have been recognized by such phenomenal students through such a great organization. Thank you, students, and thank you, Beta Alpha Psi!”

— Katie Terrell
INDUSTRY AND GOVERNMENT

Anna Neil — Assistant Controller, 
Huntington Federal Savings Bank

Nominated by — Marshall University, 
Kappa Phi Chapter

Anna Neil is the Assistant Comptroller at Huntington Federal Savings Bank, a small community bank in Huntington, WV. She is a lifelong West Virginia resident and a 2011 graduate of Marshall University in Huntington with degrees in accounting and finance. After graduation, she began her career as an auditor in public accounting and became a licensed CPA in 2012. Upon leaving public accounting in 2015, Anna worked for the City of Huntington as the Revenue Audit Supervisor, and then took her current position at the bank in 2016.

Anna is a past president of the Huntington Chapter of the WV Society of CPAs, co-chair of the Young CPA committee, and board member of the Accounting Education Foundation. She stays actively involved with Marshall University through the Beta Alpha Psi Kappa Phi chapter, as well as serving on the Advisory Board for the Division of Accountancy and Legal Environment. She is also a board member for the local Big Brothers Big Sisters organization.

In her personal time, Anna enjoys fitness classes, anything involving music and dancing, true crime podcasts, and spending her free time at home relaxing.

“I am so grateful to the Kappa Phi chapter at Marshall University for nominating me for the BIPOY in Industry and Government. It’s an incredible feeling to be recognized for your volunteer work but feels even better knowing that it makes such a positive impact on the students in Beta Alpha Psi. I’m honored to have been able to attend the annual meeting in Chicago and see so many young people who are involved in Beta Alpha Psi!”

— Anna Neil
PROFESSIONAL SERVICES

Christina Howard — Risk Advisory Partner, Dixon Hughes Goodman LLP

Nominated by — North Carolina A&T State University, Zeta Sigma Chapter

Christina serves as a Managing Partner at Dixon Hughes Goodman LLP, which ranks among the top 20 public accounting firms in the nation. Her client service experience over the course of her career has included leading teams of talented professionals to provide external audit, internal audit and risk advisory services to amazing clients in various industries. She earned her Bachelor of Science in Accounting and a Bachelor of Arts in Spanish, from North Carolina Agricultural and Technical State University, which is where her Beta Alpha Psi membership started in the Zeta Sigma Chapter. She also earned her Masters of Accountancy from the University of Virginia, McIntire School of Business. Christina continues to give of her time to members by mentoring and supporting professional development programs. She maintains an active CPA license in the state of North Carolina, and she is a Certified Fraud Examiner.

“It was an honor to receive the Business Information Professional of the Year Award during the 2019 annual meeting, in which the meeting theme was a Legacy of Excellence. It is great for us all to think about the impact we will continue to make on others’ lives — our legacy in all of our roles. Thank you to the North Carolina A&T State University Beta Alpha Psi Chapter for the nomination and may we all operate with excellence for current and future Beta Alpha Psi members.”

— Christina Howard
Blane Ruschak  
KPMG LLP

Blane attended Rutgers College in New Jersey and graduated with a Bachelors of Science in Economics in 1980. He subsequently attended the University of Hawaii at Manoa where he received a Masters in Accounting degree in 1982.

In 2000, Blane assumed the role of National Director of Campus Recruiting as part of the KPMG National Recruiting team in Montvale, New Jersey. In 2008, Blane assumed the role of Executive Director for Campus Recruiting and University Relations where he oversees all of the intern and entry level hiring for KPMG’s audit, tax and advisory practices including MBA as well as their University Relations Program.

He served as the Beta Alpha Psi President and has previously served on the BOD as the Professional Partners Chair. He served on the Board of the Accounting Program Leadership Group (APLG), the Federation of Schools of Accounting (FSA) Board of Directors, the AICPA Pre-certification Executive Education Committee (PcEEC) and the Pathways Commission taskforce related to finding ways to engage faculty and professionals from the practice in more robust collaborative ways. He serves on the Board of Directors of the Education Foundation for Women in Accounting (EFWA).

He lives in Charleston, SC, and works out of the Montvale, NJ, National Office as part of the National Human Resource team.

Blane Ruschak will assume the role of President, KPMG U.S. Foundation Inc. beginning in January 2020.

“Receiving the KPMG/Bernard J. Milano lifetime achievement award at the 2019 BAP Annual meeting along with Dr. Jan Taylor Morris will always be one of the highlights of my 37-year career at KPMG LLP. I first became involved with BAP at the International level back in 1999 as the KPMG Professional Partner and I had no idea what an amazing experience the next 20 years would bring. Never before (or since) have I been involved with a student organization where every Board member, every faculty advisor and chapter advocate, every professional partner and every student is committed to the development of future professionals. In numerous ways, BAP gave as much to me as I gave to BAP; I’m a better professional and person because of my involvement with the organization and I hope that everyone that has crossed paths with me recognizes how much they and this organization will always mean to me.”

— Blane Ruschak
Jan Taylor Morris
Sam Houston State University

Jan Taylor Morris, Ph.D., CPA, CGMA, is an Associate Professor of Accounting at Sam Houston State University, Huntsville, TX. Her primary teaching areas are financial accounting and auditing. Her other teaching interests include financial statement analysis, ethics and leadership. Jan's primary research interests relate to accounting pedagogy, auditing and accounting ethics and leadership. She has writing published in journals such as *Issues in Accounting Education*, *Journal of Accountancy*, *Journal of Forensic & Investigative Accounting*, *Journal of Behavioral Studies in Business*, *Strategic Finance*, *Management Accounting Quarterly*, *Journal of Accounting and Free Enterprise*, *Journal of Health Management* and *Journal of Healthcare Finance*. Jan is active in service to academia and the profession as well as her community. In addition to several other service roles, she is a past-President of the International Board of Directors of Beta Alpha Psi, a member of the AICPA's Accounting Education Executive Committee and the AICPA's Women’s Executive Initiative Task Force, an external professor with KPMG, a past trustee with the Texas Society of CPAs Accounting Education Foundation, and is a Court Appointed Special Advocate for children in protective services. Jan is a licensed CPA in the state of Texas and holds the Chartered Global Management Accountant® (CGMA®) designation through the AICPA.

"Receiving the KPMG/Bernard J. Milano Beta Alpha Psi Lifetime Service Award during BAP’s 100th Anniversary Celebration and 2019 Annual Meeting is one of the greatest honors of my professional life. I am proud to have been a part of Beta Alpha Psi for so many years. This organization has changed my life and the lives of countless faculty, students and professional partners — providing opportunities to grow in knowledge, in appreciation of service to others, in capacity for leadership, in lifelong friendships, and in so many other immeasurable ways. I wish to thank Alexandra Miller, 2018–19 President of the International Board of Directors, as well as KPMG and Bernie Milano for this tremendous honor! I also want to thank them and so many others, including Margaret Fiorentino, BAP Executive Director, for their unwavering friendship and support over the years. Finally, I wish to congratulate Blane Ruschak, my fellow award winner, for his lifetime commitment and service to Beta Alpha Psi and thank him for being such a wonderful friend, advisor, and confidant through our years of service together."

— Jan Taylor Morris
The Medal of Inspiration is given each year to one student whose story exemplifies greatness above and beyond Beta Alpha Psi. These stories can take many forms, but they serve as an example for other students to strive toward. This year, we are proud to honor **Indira Karimova**. Indira graduated last spring with a bachelor’s degree in accounting and will begin pursuing her master’s degree in accounting with the hopes of earning her CPA. She was on the president’s list, was a member of Phi Theta Kappa Honor Society and received the American Association of University Women Scholarship, President Transfer Scholarship and the East Texas Trio Alliance Scholarship, among others. In addition, she was active with various organizations outside of school. Her academic success despite growing up with the odds against her is what makes Karimova a fitting recipient of this award.

Karimova was born in Kyrgyzstan, part of Central Asia, and dreamed of going to America to study. Instead, she was arranged to marry her second cousin when she was 19 years old. Shortly after her wedding and while pregnant with her first child, Karimova and her husband came to the United States, giving her hope that her dream of going to school would come true. However, her husband did not support her educational goals.

Despite that lack of support, Karimova learned English and obtained her GED, and she eventually took her two children and left her husband. While raising two daughters as a single mother, she finished her college prep classes and Christian Women job courses and graduated from Tyler Junior College with Magna Cum Laude and the University of Texas at Tyler this past spring.

“My name is Indira Karimova, and I am the winner of the amazing 2019 Beta Alpha Psi’s (BAP) Medal Inspiration Award, sponsored by AICPA. Receiving this award showed me that hard work and dedication does pay off, no matter what the circumstance is. Most importantly, being a part of BAP and being the winner of this honor award, proved to my daughters that their mom’s commitment to her dream has been honored. I want them to see that they can do anything they put their minds to.

From the bottom of my heart, I would like to again thank BAP and the AICPA team for choosing me to be the recipient of this great honor. I never thought that, at the age of 32, my dream of getting a college education would come true, as well as the opportunity to be a part of BAP. I believe this award will benefit me and encourage me to continue my education and become a CPA.

Lastly, because of this award, I was able to go to annual meeting, visit Chicago, and meet great people. At the conference, inside my heart I said to myself, ‘one day my daughters or maybe my grandkids will be sitting in one of those seats, and they will be part of BAP. They will remember that their mom or grandma was the first person who opened the door to BAP for them, and she was the winner of the Medal Inspiration Award.”

— Indira Karimova
Margaret Fiorentino
Executive Director of Beta Alpha Psi

“I am beyond grateful to have been recognized for the 2019 President’s Award. I look forward to continuing to serve the students, faculty, board, chapter advocates and the Professional Partners in the pursuit to carry Beta Alpha Psi into the next 100 years.”

— Margaret Fiorentino
Raghu Tadepalli, Ph.D.
Elon University

- Dr. Raghu Tadepalli began service as dean of the Martha and Spencer Love School of Business at Elon University in July 2012. During his time at Elon, the Love School of Business was ranked among the country’s Top 50 undergraduate business programs by Poets & Quants, launched M.S. in Accounting and M.S. in Management programs, established the Center for Organizational Analytics, achieved AACSB re-accreditation in 2014 and 2019, and grew by 52% over a six-year period. Prior to Elon, Dr. Tadepalli served as Murata Dean and Professor of Marketing in the F.W. Olin Graduate School of Business at Babson College and dean of the Graduate School and associate dean in the Williams College of Business at Xavier University. He earned his doctorate from Virginia Tech and MBA from Arizona State University.

“The students in our Lambda Xi chapter of Beta Alpha Psi make us proud with the work they do both in the university and in the community. It is an honor to be nominated by them for the Outstanding Dean award and to be selected to receive the award. I thank Dr. Eric Jack and the members of selection committee for this honor. I have the privilege of working with an outstanding group of faculty and staff, all of whom are devoted to the success of our students and our Beta Alpha Psi chapter helps show our students at their very best.”

— Raghu Tadepalli
Sponsored by RSM US LLP since 2007

Sandra Cereola, Ph.D.
James Madison University
Eta Delta Chapter

“I wish to thank Beta Alpha Psi (BAP) for honoring me with the one of the 2019 BAP Outstanding Faculty Advisor Awards. I have been a BAP faculty advisor for over 15 years at James Madison University (JMU) and it has been a labor of love. Why? Because I get to advise some of the best and brightest students in the College of Business and watch them grow not only academically but also professionally.”
— Sandra Cereola

Connie McKnight
University of Central Arkansas
Theta Lambda Chapter

“Wow! It was an honor to receive the Beta Alpha Psi Outstanding Faculty Advisor Award. I am grateful to be a part of this amazing organization. I know we are making a difference in the lives of many students.”
— Connie McKnight

Cathy Miller, Ph.D.
University of Michigan Flint
Eta Xi Chapter

“I am so honored to receive the OFAA. I consider it a lifetime achievement award.”
— Cathy Miller
OUTSTANDING FACULTY ADVISOR WINNERS

Sponsored by RSM US LLP since 2007

Debbie Pike, CPA
Saint Louis University
Zeta Nu Chapter

“A faculty advisor of a Beta Alpha Psi chapter knows that they will be rewarded by working with great students. One of the most unexpected benefits of serving, however, has been the privilege of interacting with so many wonderful faculty advisors. To be honored at the annual meeting amongst so many great peers, made me speechless and is a memory I will always cherish.”
— Debbie Pike

T.S. Amer, Ph.D.
Northern Arizona University
Delta Upsilon Chapter

“I am thrilled and honored to have received recognition as an outstanding faculty advisor. I know how much effort my colleagues who serve as faculty advisors invest in their students so to be acknowledged among such a group is also humbling.”
— T.S. Amer

Patricia Gaukel
University of South Florida
St. Petersburg
Mu Gamma Chapter

“Receiving the Faculty Adviser of the Year award at the 100th-anniversary convention of Beta Alpha Psi was an experience that I will always remember. We were able to bring eight students from our small chapter to Chicago and sharing the award with them meant a lot to me. Our chapter started with just 11 students only 12 years ago, and I have enjoyed watching the students mature, grow professionally and learn to give back to the school and community. The award is especially meaningful to me because I served as the chapter President when I was in college many years ago. I still keep in touch with several Beta Alpha Psi chapter members from my college days. Beta Alpha Psi has been a lifelong presence in my life!”
— Patricia Gaukel
• 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 own 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.

### RETURN PREPARATION

- San Francisco State University
- University at Buffalo
- University of Massachusetts Amherst
- Brigham Young University
- Creighton University
- California State University Fresno
- Boise State University
- Gonzaga University
- The University of Tampa
- University of Montana
- Idaho State University
- California State University Chico
- Truman State University
- University of Connecticut
- Utah Valley University
- Ohio Northern University
- The University of Akron
- University of Southern California

### FACILITATED SELF-ASSISTANCE

- Brigham Young University
- University of Utah
- Boise State University
- University of South Florida

### VOLUNTEERISM

- Brigham Young University
- Indiana University
- Boise State University
- Gonzaga University
- University of Missouri Kansas City
- San Francisco State University
- University at Buffalo
- University of Massachusetts Amherst
- Creighton University

### 1040NR PREPARATION

- University of Massachusetts Amherst
- University of Denver
- Indiana University
- Ohio Northern University
- Colorado State University
- Idaho State University
- Utah Valley University
- The University of Akron

### REGIONAL

- Rocky Mountain – 50% participation

### SUPERIOR

- University of Massachusetts Amherst
- California State University Long Beach
- University at Buffalo
- Brigham Young University
- San Francisco State University
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 2019 included: Roots, Branches and Shade.
- Deloitte LLP Professional Partner Representative Scott McQuillan presented the awards at the Annual Meeting.
- Each of the winning teams from the nine regional meetings competed at the 2019 Annual Meeting for their winning topic.

**ROOTS**

FIRST PLACE .......... Bradley University, Zeta Lambda Chapter
SECOND PLACE ........ Washington State University Vancouver, Nu Theta Chapter
THIRD PLACE ........ University of Technology Sydney, Upsilon Tau Sigma Chapter

**BRANCHES**

FIRST PLACE .......... University of Technology Sydney, Upsilon Tau Sigma Chapter
SECOND PLACE ........ Towson University, Iota Zeta Chapter
THIRD PLACE ........ University of Central Arkansas, Theta Lambda Chapter

**SHADE**

FIRST PLACE .......... Missouri State University, Theta Pi Chapter
SECOND PLACE ........ Portland State University, Epsilon Alpha Chapter
THIRD PLACE ........ Old Dominion University, Zeta Pi Chapter
## 2019 Best Practices Regional Meeting Winners

### Roots

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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 understands 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.

- Chapters submit a written proposal on what diversity means to their chapter and its importance in the professional world. In their submission, chapters must also include a plan of action to make an impact at the chapter level, as well as strategies that may contribute to the overall impact on the diversity in their school of business.

- EY Professional Partner Representative Paige Sacks presented the awards.

### WINNERS

<table>
<thead>
<tr>
<th>Place</th>
<th>Chapter Name</th>
<th>Chapter Name</th>
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<tr>
<td>1st</td>
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<td>2nd</td>
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<td>Mu Omega Chapter</td>
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<tr>
<td>3rd</td>
<td>Grand Valley State University</td>
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<td>University of North Carolina at Charlotte</td>
<td>Eta Alpha Chapter</td>
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<tr>
<td>3rd</td>
<td>Kent State University</td>
<td>Beta Psi Chapter</td>
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The University of Sydney  
Stonehill College  
Grand Valley State University  
University of North Carolina at Charlotte  
Kent State University
**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. In an effort 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 are required to submit a five-minute video presentation that explains and/or demonstrates why their chapter deserves the KPMG Gold Challenge award.

- KPMG LLP Professional Partner Representative Blane Ruschak presented the awards.

**WINNERS**

<table>
<thead>
<tr>
<th>University of Texas at Arlington</th>
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<td>The University of Sydney</td>
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<td>University of South Florida</td>
<td>Delta Gamma Chapter</td>
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<tr>
<td>University of Nevada Las Vegas</td>
<td>Theta Omicron Chapter</td>
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![University of Texas at Arlington](image1) ![Bradley University](image2) ![University of Technology Sydney](image3) ![Florida International University](image4) ![The University of Sydney](image5) ![Western Illinois University](image6) ![University of Alabama at Birmingham](image7) ![University of South Florida](image8) ![University of Nevada Las Vegas](image9)
Sponsored by Grant Thornton LLP since 2010

The purpose of this award is to help encourage ethical behavior throughout the accounting, finance and information technology professions. The business world has experienced the ethical failures of many individuals and organizations in the profession, and these actions have had detrimental and lasting effects on the economy and individual investors and have damaged the reputation of these professions. It is a core value of Beta Alpha Psi to encourage ethical behavior.

One way to encourage this behavior is to examine difficult situations demanding ethical responses and by recognizing the resulting exemplary ethical behavior by individuals and/or organizations in the professions, government, business, academia and not-for-profits.

Chapters submit an abstract for a planned project that encourages ethical behavior and a summary of the outcomes and an overall assessment after the project is completed. Grant Thornton LLP Professional Partner Representative Tony Fuller presented the awards.

WINNERS

| The University of Sydney         | Lambda Omega Chapter          |
| The University of Technology Sydney | Upsilon Tau Sigma Chapter     |
| Washington State University Vancouver | Nu Theta Chapter       |
| Arizona State University         | Beta Tau Chapter              |
| Portland State University        | Epsilon Alpha Chapter         |

The University of Sydney, Lambda Omega Chapter/The University of Technology Sydney, Upsilon Tau Sigma Chapter

Arizona State University, Beta Tau Chapter

Portland State University, Epsilon Alpha Chapter
Sponsored by Moss Adams LLP since 2008

- Project Run With It involved 95 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 24 teams of four and have about one day to develop a formal presentation showcasing their solution to the business issues the NFPs presented in their “request for proposal” for consulting services.
- Before the Annual Meeting, the NFP agencies provide background information and during the meeting are available to answer the participating students’ questions.
- Presented by Elizabeth Dollar from Moss Adams LLP.

WINNERS:

**THE VOLUNTEER CENTER: TEAM A–4**

<table>
<thead>
<tr>
<th>Name</th>
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<tbody>
<tr>
<td>Drew Isennock</td>
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<tr>
<td>Rhys Jennings</td>
<td>The University of Sydney Lambda Omega Chapter</td>
</tr>
<tr>
<td>Emma Kolar</td>
<td>Grand Valley State University Kappa Beta Chapter</td>
</tr>
<tr>
<td>Kira Wolak</td>
<td>Florida Atlantic University Eta Tau Chapter</td>
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**PREVENT BLINDNESS: TEAM B–5**

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<tr>
<td>Ecaterina Botten</td>
<td>University of Wyoming Delta Alpha Chapter</td>
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<tr>
<td>Reed Carlson</td>
<td>Southeast Missouri State University Mu Xi Chapter</td>
</tr>
<tr>
<td>Justyna Filipkowski</td>
<td>Pace University Iota Lambda Chapter</td>
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<td>Jenna Wilson</td>
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**LINK UNLIMITED SCHOLARS: TEAM C–4**

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<tr>
<td>Jenifer Mant</td>
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<td>Clay Mimbs</td>
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<td>Jose Moreno</td>
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<tr>
<td>Juliet Polisena</td>
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**EDUCATIONAL FOUNDATION FOR WOMEN IN ACCOUNTING: TEAM D–2**

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<tr>
<td>Brian Ferguson</td>
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<td>Alexander Larson</td>
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<td>Nicole Wise-Pruitt</td>
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Presented by Elizabeth Dollar from Moss Adams LLP.
To qualify as superior or distinguished, each chapter must report a designated amount of Reaching Out Activities (ROA) and each chapter candidate/member must have a certain number of professional and service hours, as set forth in the Program for Chapter Activities. Each Superior chapter receives a monetary award of $500 from KPMG LLP and the KPMG Foundation.

**SUPERIOR WINNERS**

Appalachian State University  
Arizona State University  
Auburn University  
Ball State University  
Bentley University  
Boise State University  
Bowling Green State University  
Brigham Young University  
California State University East Bay  
California State University Fresno  
California State University Fullerton  
California State University Long Beach  
California State University Los Angeles  
California State University Northridge  
California State University Sacramento  
Case Western Reserve University  
Central Michigan University  
Cleveland State University  
Colorado State University  
Creighton University  
Deakin University  
Eastern Illinois University  
Eastern Michigan University  
Elon University  
Emporia State University  
Florida Atlantic University  
Florida Gulf Coast University  
George Mason University  
Georgia Southern University  
Gonzaga University  
Grand Valley State University  
Hofstra University  
Idaho State University  
Iowa State University  
Jacksonville State University  
James Madison University  
Kansas State University  
Kennesaw State University  
Kent State University  
Long Island University Post  
Louisiana State University  
Louisiana Tech University  
Loyola University Maryland  
Manhattan College  
Marshall University  
Middle Tennessee State University  
Minnesota State University Mankato  
Mississippi State University  
Missouri State University  
Monash University  
Murray State University  
New Mexico State University  
North Carolina A&T State University  
Northern Arizona University  
Northern Illinois University  
Oakland University  
Ohio Northern University  
Ohio University  
Old Dominion University  
Oregon State University  
Pace University  
Portland State University  
Quinnipiac University  
Saint Louis University  
Salisbury University  
Sam Houston State University  
Samford University  
San Diego State University  
San Francisco State University  
Seattle University  
Southeast Missouri State University  
Southeastern Louisiana University  
Southern Illinois University at Carbondale  
St. John’s University Staten Island  
Stephen F. Austin State University  
Stetson University  
Stonehill College  
Suffolk University  
SUNY Oswego  
Temple University  
Tennessee Tech University  
Texas State University  
The University of Akron  
The University of Alabama  
The University of Memphis  
The University of New Mexico  
The University of Southern Mississippi  
The University of Tampa  
Towson University  
Truman State University  
University at Buffalo  
University of Arizona
### SUPERIOR AND DISTINGUISHED CHAPTERS

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### DISTINGUISHED WINNERS

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