BETA ALPHA PSI

THE INTERNATIONAL HONOR ORGANIZATION FOR FINANCIAL INFORMATION PROFESSIONALS

SAMPLE INVITE LETTER – PLEASE EDIT ITEMS IN RED

Welcome back to campus! Congratulations on your academic performance up to now. The dedication you have shown to your coursework is evident and to be commended. Because of your achievement, we invite you to join Beta Alpha Psi, the international honorary society for financial information professionals. Members of the Greek Name Chapter of Beta Alpha Psi are among the great students of the Name of Business School at School Name. Our chapter has a story with alumni who are now firm partners, corporation executives, and industry leaders. Chapter please add any relevant information here.

Beta Alpha Psi is an extraordinary organization with campus, regional, and national resources to provide you opportunities to increase your professionalism, expand your social and professional networks, and serve your campus and community. Opportunities to be involved as a leader in the Greek Name chapter here at School Name are numerous! In addition to events on campus, student members have opportunities to travel to Region Name cities for mid-year and annual meetings. In recent years, the annual meeting has been held in Baltimore, San Antonio, and Orlando.

Beta Alpha Psi holds its candidates and members to a high standard. Candidates must have an overall GPA of a 3.0 or higher and have earned an average of 3.0 or higher in upper-level major courses. It is our sincere hope that all eligible students will join.

Please complete the attached application to join today. Once completed, return your application via email to Chapter email or to the Department office in Location. Candidate dues are **$** . We look forward to receiving your completed application.

Need more information? Explore bap.org, visit our chapter website at **address**, see us on Instagram, and talk with members and faculty advisors. Welcome to Beta Alpha Psi!

Faculty advisor name
Faculty advisor signature

Beta Alpha Psi Reporting Reminders 2026-2027

Key deadlines

- October 15 (US): $325 chapter maintenance fee due. $50 late fee after October 15. Oceania deadline: June 15.
- December 15: US Mid-Year report due for award-seeking, petitioning, and probation chapters. Enter fall candidates and activities.
- December 15: Oceania End of Year report due.
- April 1: Annual Meeting website launches. Check the site for registration deadlines.
- April 30: Executive Office fiscal year end. Pay candidate dues by this date.
- June 1 (US): End of Year report due. Late filing penalty: $100.
- June 17: End of Year reporting status sent to Faculty Advisors.
- July 1: Last day to appeal End of Year reporting results.

Dues and invoices

- Candidate, honorary, and faculty dues: $85 per record, due within 60 days of entry in the Reporting Intranet. Late fee: $20 per record.
- Chapter maintenance invoice: Log in > Beginning of Year report > Payment Options. Pay by credit card or download an invoice for check payment.
- Candidate dues invoice: Log in > Reporting and Membership > Generate Dues Invoice. Select names, then pay by card or print an invoice. Email bap@bapeo.org if you need an invoice on Beta Alpha Psi letterhead.

End of Year reporting - US chapters

- Complete the End of Year report by June 1.
- If average chapter receipts are $50,000 or less for the last three years: file the 990-N e-postcard between May 1 and June 1, send proof to bap@bapeo.org, and enter the submission ID in the End of Year report.
- If average chapter receipts are over $50,000 for the last three years: complete all three tabs of the Over $50K spreadsheet and upload it with the End of Year report.
- Upload financial statements with the End of Year report.
- Use the chapter tax ID from the Chapter Profile page. Email bap@bapeo.org if you cannot locate it.

Payments and award stipends

- Checks payable to Beta Alpha Psi: 11161 E State Rd 70, Ste 110-608, Lakewood Ranch, FL 34202.
- Award stipends: ACH is preferred. Email bap@bapeo.org for a Ramp invitation. Checks are available if needed.

W-9 instructions

- Download the current W-9 from the IRS website.
- Line 1: Beta Alpha Psi (Greek name) Chapter
- Line 2: Name of Your School
- Use the chapter tax ID from the Chapter Profile page.
- Organization type: check Other and write 501 c 3.
- Enter the chapter address, sign and date the form, and send it to bap@bapeo.org.

Membership and access

- Transfer student credit: Email bap@bapeo.org with the student name, former chapter, and dates. The Executive Office will verify attendance and provide next steps.
- Certificates: Enter candidate records, pay the $85 fee, and move records to Submit for Initiation. Advisors, allow one week to receive a pdf file. Email bap@bapeo.org for a specific deadline.

- Digital badges: Email bap@bapeo.org to request badges. Students should watch for a Credly.com email, including spam. If no badge arrives within 15 days after the record is submitted for initiation and paid, email bap@bapeo.org.
- Advisor Reporting Intranet access: Email bap@bapeo.org.
- Chapter officer access: The advisor creates officer accounts and adds officers to the Chapter Profile page. See the Chapter Reporting 101 Guide.
- Alumni & Member Network: Free for alumni and members. Current members are automatically included. Contact the Executive Office if you are unable to login.

Mid-Year and Annual Meeting registration

- Registration deadline and fees are to be determined.

Questions

- Check Faculty Advisor Resources first, then email bap@bapeo.org.

PROGRAM FOR CHAPTER ACTIVITIES AT-A-GLANCE 2026-2027

CHAPTER REQUIREMENTS

Chapters must meet certain requirements depending upon the desired achievement level. The requirements include submission of reports, initiation, Reaching Out activities, professional activities, and service activities. Chapters not meeting the minimum requirements will be placed on probation for the subsequent year.

A summary of the required activities by achievement level follows:

MINIMUM ACTIVITIES REQUIRED BASED ON CHAPTER ACHIEVEMENT LEVEL

Chapter Achievement Level	Beginning of Year Report	Mid-Year Report	Initiation	End of Year Report	Reaching Out Activities	Professional Activities	Service Activities
Bronze	Yes	N/A	Yes	Yes	3	6	2
Silver	Yes	Yes	Yes	Yes	8	10*	4
Gold	Yes	Yes	Yes	Yes	11	12*	6

Award seeking chapters must include at least 1 mandatory "Essential Skills session (Refer to Essential Skills topics under Professional Activities).

All chapters seeking Gold and Platinum status must attend either the Annual Meeting or a Mid-Year Meeting. To win Platinum, you must submit for the competition.

To qualify as a professional or service activity, the event must be at least 50 minutes in length and at least 20% of the chapter's active members/candidates must participate in the event.

IMPACT ACTIVITY POINTS

An Impact Activity is a Professional or Service Activity that demonstrates a strong effect has been made to your university or community. Impact activities earn an extra point toward award status (i.e., an extra professional or service point). Impact activities may include but are not limited to the following elements:

- Tutoring
- Financial Volunteer Support (donating accounting or bookkeeping services)
- Mentoring
- Media Promotion (TV or Print)
- Sharing business/college knowledge (e.g., volunteering with high school, incoming freshmen, and undeclared students)
- Community College Outreach
- AACSB Societal Impact Goal for your business school
- VITA

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REPORTING IMPACT POINTS

Utilize the drop-down function in the Reporting Intranet and complete the online form to report Impact Points. Document the number of people impacted, types of audiences, and describe the impact of the activity.

The online student can meet their service requirements via the same model, only theirs would count as "BAP-Service for Online Students". Examples of virtual service activities include:

- Tutoring other online students in accounting, finance, business technology and analytics
- Tutoring high school students in math
- Tutoring Community College Students in accounting, finance, business technology and analytics
- Volunteering at a local food bank, animal shelter, nursing home or community center

ESSENTIAL SKILLS REQUIREMENT FOR AWARD-SEEKING CHAPTERS

Essential Skill - Mandatory Professional Activity – Award Seeking Chapters (Platinum, Gold & Silver). Award-seeking chapters are required to conduct one mandatory professional session that will include a session devoted to Essential Skills. Many students seek to obtain internships and full-time job opportunities through Beta Alpha Psi, but once they have the job, they must develop their "essential skills" to succeed professionally. Each chapter can choose one of the below topics for their Essential Skills session.

Each Essential Skill activity should be entered into the Reporting Intranet as: **ES – Topic Title.**

CHAPTER REFRESH – 2026-2027

BAP has established a BAP Chapter Refresh program to assist chapters in planning for 2026-2027. The BAP Chapter Refresh provides chapters with more Reaching Out Activities (ROAs). The Executive Office will be offering chapters resources for hybrid (live and virtual) opportunities that include the below:

Chapter Reboot Timeline

- Monthly beginning September 2026 – Chapter Reporting 101
  - A reporting event for faculty advisors and officers. In this session, you will learn the basics of chapter reporting in the BAP intranet.
- Chapter Reporting Quiz – Score 80% or better
- Fall 2026 and Spring 2027 (TBD) – Virtual Initiation Event
  - The Executive Office and Professional Partners will host this professional session and live virtual initiation for all eligible members.

Chapters must retain detailed information regarding the non-Beta Alpha Psi activities until October 1 of the following year.

OFFICER TIME: Please record officer and committee chair time as 1 service activity for fall and 1 service activity for spring.