

# BΑΨ

**National Honorary Accounting  
Organization**

# BETA

# ALPHA

# PSI

University of Central Florida  
School of Accounting  
Epsilon Gamma Chapter

Handbook  
Spring 2012

BAP homepage address: <http://www.bapucf.com/>

## Handbook – Spring 2012

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# NOTES

## **National Objectives**

The primary objectives of Beta Alpha Psi, the national scholastic, international honors organization, is to encourage and give recognition to scholastic and professional excellence in the business information field, which includes the following:

- The promotion of the study and practice of accounting, finance and information systems;
- The provision of opportunities for self-development and association among members and practicing professionals;
- The encouragement of a sense of ethical, social, and public responsibility.

## **History of the Epsilon Gamma Chapter of Beta Alpha Psi**

The installation of the Epsilon Gamma Chapter of Beta Alpha Psi took place on August 13, 1977. The original charter consisted of eighty members (alumni and present students), four honorary members, and eight faculty members.

Before the chapter installation could take place, many requirements had to be met. One requirement was that an active Student Accounting Society (SAS) had to be established for at least two years. Since SAS had already been founded in 1972, Beta Alpha Psi had a good foundation on which to begin. Next a preliminary petition listing prospective members, faculty members, and a background of the University and Student Accounting Society had to be submitted and reviewed by the National Secretary/Treasurer. After this petition was corrected and modified, the National Council approved the final draft. In March 1977, after National approval, Doris Cook (1977-78 National President of Beta Alpha Psi) visited the campus and met with prospective Beta Alpha Psi members to consider the application. Her recommendation was affirmative, and the installation ceremony and banquet took place in August 1977.

Since its inception in 1977 the chapter has steadily grown, achieving superior status for the first time for the 1981-82 year. We regained this status in the 2008-09 year and are currently a superior chapter.

## **Beta Alpha Psi Insignia**

The emblem of the organization denotes the promise of careers for financial information professionals. The rising sun signifies the profession as one rising ever higher among economic activities. The crossed keys symbolize knowledge of accounting as a means of opening doors of the financial world. The letters Beta, Alpha, and Psi denote Scholarship, social Responsibility, and Practicality, respectively.

## **Epsilon Gamma Chapter Objectives**

The membership of the Epsilon Gamma Chapter of Beta Alpha Psi holds the following to be their main objectives:

- To encourage professionalism among students by providing the opportunity for association with members of the accounting profession;
- To recognize scholastic achievement by students in accounting;
- To assist community and campus organizations by providing accounting services;
- To cooperate with other student and professional associations in promoting a general understanding of accounting and its professional opportunities;
- To sponsor social activities in order to foster interaction and cooperation among the members.

## **Principles of Conduct**

### **Introduction**

Based on a long experience, every profession has rules of conduct that has have been carefully formulated by its national societies. These rules are founded on the fundamental ideas of fair play and honor without which no profession can exist. Since the public has a right to know, it should be told how the members of any profession are expected to conduct themselves when performing professional services. Only through such knowledge can the public safely determine the measure of responsibility to be placed upon a professional person, and only through such knowledge can it discriminate between ethical and unethical practitioners.

**Intellectual Integrity.** Honesty is a fundamental attribute of an accountant. The accountant, public or private, occupies a unique position in professional fields. He or she must serve all who observe the results of his work. There can be no deviation from scrupulous honesty in performing assigned tasks and in reporting work done; no standard other than the honesty performance of one's full duty is acceptable.

**Loyal Service.** The accountant must be loyal to his or her employer, to other employees and to clients. The accountant should not disparage the business enterprise for which he or she performs professional services. His or her professional standards require the same careful devotion to duty for all businesses served.

**Respect for Confidence.** Confidentiality pervades all the relationships of the accountant. He or she should not voluntarily impart to persons outside his or her own organization any confidential information. If an accountant does not properly respect the facts revealed to him or her, their reputation will suffer.

**Professional Bearing.** Professional bearing means more than merely being self-confident. Business activities are accomplished for the most part by persons working together in a cooperative relationship. In such relationships, the qualities of self-assurance and tolerance are important factors, but the presence of one of these qualities without the counter-balancing effect of the other is likely to be disastrous. These qualities should at all times be under restraint, lest self-assurance be extended to the point of distasteful aggressiveness and tolerance be carried so far as to restrict initiative.

**Responsible Behavior.** One's private and public lives are closely related. The accountant should guard his or her private conduct as carefully as his/her professional conduct, keeping in mind the impact that one's personal life and choice of associates may have upon his/her professional image.

**Personal Appearance.** An observer who notes slovenliness in personal appearance may instinctively expect an equivalent carelessness in professional conduct. Such carelessness may not be present in fact, but outward appearances seldom fail to raise the question.

### **Program for Chapter Activities**

The program for Chapter Activities serves as a guide to the chapter for preparing programs and activities best suited for the chapter's unique student membership and environment. It is expressly structured to provide maximum flexibility for the local chapter in preparing a program of activities. The program is also structured to further the goals of the national organization for scholastic and professional excellence. Its design also incorporates these features: (1) encourage chapters to direct their activities in certain directions that are considered especially beneficial, (2) provide a vehicle for monitoring the quality of the chapter's activities by the National Council, (3) provide a means of identifying which chapters excel in serving its members, school, community, and profession.

Active involvement of all the members is essential if the objectives are to be achieved. The chapter's activity plan should be carefully thought out and implemented to assure the achievement of the stated objectives. As part of the "Year-End-Report" the chapter is required to prepare a qualitative evaluation of the extent to which it has attained its stated objectives.

To encourage a wide range of chapter activities involving a large proportion of the chapter's membership, a specified number of points has been established, however, local chapters should not engage in activities merely to earn points under the Program for Chapter Activities. The Program should be concerned as a guide to activities and a way to gauge its achievements in serving its members, school, community, and profession.

## **ALL EVENTS MUST REFLECT THE PROFESSIONAL NATURE OF THE ORGANIZATION**

While participating in the activities of the Organization, all members are expected to conduct themselves in a manner that is appropriate for a professional accountant.

In keeping with the professional nature of Beta Alpha Psi, the Board of Directors requires adherence to the following policy. At no national, regional or local chapter event will content be tolerated that is demeaning or derogatory to any individual or groups of individuals. The Organization specifically condemns the use of crude or sexually explicit language. The Organization also condemns the use of racial, religious, ethnic, or gender categories for purposes that are offensive because of their derogatory nature.

### **NO ALCOHOL POLICY**

Beta Alpha Psi prohibits the consumption of alcohol products at any meetings, functions, or events that are sponsored, publicized or otherwise endorsed by Beta Alpha Psi when the chapters have primary responsibility.

The prohibition of alcohol applies to the following:

- Chapter meetings, regional meetings, national meetings, the Thomas J. Burns national student seminar, the graduate case seminar, leadership programs, and all other meetings or programs of Beta Alpha Psi;
- All alcoholic products whether provided by the chapter, by a speaker or external organization, or whether available at a charge to members and/or guests.

Violation of this policy will result in sanctions as deemed appropriate by the Beta Alpha Psi National Board of Directors.

### **NO SOLICITATION POLICY**

It is the policy of the Board to not permit chapter activities to be used as a conduit for the sale of products or services to students. Persons should not be asking to participate in a chapter activity if their participation is primarily promotional in nature. Any presentation regarding professional examinations, preparation for the examination, or a demonstration of an examination review program by a representative of a provider of review services is considered promotional in nature. Any chapter event, at which the chapter permits the solicitation of its members to purchase products or services, will result in the event being assigned no credit in any category of the Program for Chapter Activities.

# **Epsilon Gamma Chapter of Beta Alpha Psi**

## **Statement of Objectives** For the Year Ending April 30, 2012

The objectives of the Epsilon Gamma Chapter of Beta Alpha Psi Organization for the 2011-2012 academic year are as follows:

In addition to the objectives of the National Organization “to encourage and give recognition to scholastic and professional excellence in the field of accountancy,” the Epsilon Gamma Chapter has established the following objectives:

1. To maintain Superior Chapter status.
2. To promote, through activities, the association of accounting students and professional accountants.
3. To provide opportunities and instill motivation for the self-development of our members.
4. To promote the development of communication, presentation, and leadership skills.
5. To promote a professional attitude among members and encourage participation of all accounting students and faculty in our professional and social activities.
6. To provide exposure to innovative accounting topics and careers through the use of technical programs and seminars that are not covered in our academic curriculum.
7. To provide exposure to accounting students of the various working environments in the accounting field.
8. To continue to provide both accounting and non-accounting services to various schools and community projects.
9. To continue to inform area high school and community college students of the opportunities available in the field of accounting and to promote the collegiate study of accounting.
10. To continue the development of a Minority Recruitment Program that will expose minority students to the accounting profession.
11. To provide accounting and charity services for the campus and the community.
12. To submit a quality manuscript to the National Student Seminar and send a representative to present it.
13. To continue successful fund raising activities to support chapter activities, send representatives to both the National and Regional Meetings, and provide funds in the Fall and Spring semester to the School of Accounting’s scholarship fund.

14. To give recognition to a local "Outstanding Alumnus" who has displayed professional excellence, leadership, and community involvement as an accounting professional.
15. To establish a fund balance equivalent to one year's operation.

The Epsilon Gamma Chapter has planned many activities for the up-coming Spring semesters which we feel will facilitate the above objectives. **In order to attain Superior Recognition, it is important that we, as members, become aware and support our Chapter.** With active and enthusiastic support from our membership, our Chapter can receive the recognition it deserves.

# **BAP Spring Officers' E-mail List**

**Lindsey McCann**  
President  
president.bap.ucf@gmail.com

**Victoria Barnett**  
Executive Vice President  
vp.bap.ucf@gmail.com

**Kaitlin Border**  
VP of Professional Activities  
vp.professional.bap.ucf@gmail.com

**Aaron Blades**  
VP of Chapter Activities  
vp.chapter.bap.ucf@gmail.com

**Leif Bang**  
VP of Social Activities  
vp.social.bap.ucf@gmail.com

**Artus Nemati**  
VP of Technology  
vp.technology.bap.ucf@gmail.com

**Alicia Hasty**  
VP of Correspondence  
vp.correspondence.bap.ucf@gmail.com

**Kristen Martell**  
Treasurer  
treasurer.bap.ucf@gmail.com

**Marc Yeager**  
Candidate Coordinator  
bap.coordinator@gmail.com

**Nick Dunnett**  
VP of Marketing  
vp.marketing.bap.ucf@gmail.com

## Membership Requirements

### Undergraduate Students

- 1) Be declared an accounting, finance, or information systems major and have taken Principles of Financial & Managerial Courses.
- 2) Receive an 'A' or 'B' in an upper level accounting course. If a candidate is currently enrolled in their first upper level course, they must submit proof of grade prior to initiation.
- 3) Have at least one academic semester remaining at UCF after the semester of initiation (summer semester does not count).

**AND**  
**one from each box**

<b>Column A</b> <b><u>Overall GPA Requirements</u></b>	<b>Column B</b> <b><u>Major GPA Requirements</u></b>
3) Cumulative 3.0 GPA in <u>all courses</u> 4) 3.25 GPA in last 60 credit hours 5) 3.5 GPA in last 30 credit hours	3) Cumulative 3.5 GPA in Principles of Financial & Managerial Accounting (ACG 2021 & ACG 2071)  4) 3.2 GPA in all upper-level (3000 and above) Accounting and Finance courses (based on declared major). This does NOT include core business classes

### Graduate Students

- 1) Elected accounting, finance, or information systems as his/her area of concentration and have completed a semester or be currently enrolled in the graduate program.
- 2) Have at least one academic semester remaining at UCF after the semester of initiation (summer semester does not count).



# Beta Alpha Psi

## Pledge Point System Spring 2012

<b><u>Professional Activities</u></b>	<b><u>Number of Events</u></b>	<b><u>Hours per Event</u></b>	<b><u>Hours Available</u></b>
*Chapter Meetings – Must attend at least 9	12	1	12
Career Expo Crash Course	1	2	2
Resume Workshop	1	2	2
Interview Workshop	1	2	2
Mock Interviews	2	1	2
Institute of Internal Auditor Meeting –Limited Space	3	2	6
IIA Panel	1	2	2
Industry Panel	1	2	2
Career Expo	1	4	4
Business Dinner Etiquette	1	2	2
<b>Total Hours Available</b>			<b>32</b>
<b>Total Hours Required</b>			<b>20</b>

<b><u>Service Activities</u></b>	<b><u>Number of Events</u></b>	<b><u>Hours per Event</u></b>	<b><u>Hours Available</u></b>
Adopt a Road	7	1	7
A Gift for Teaching – Limited Space	1	3	3
Ronal McDonald House – Limited Space	1	4	4
Beach Clean-up	1	4	4
*Relay for Life	1	8	8
Habitat for Humanity	1	5	5
<b>Total Hours Available</b>			<b>31</b>
<b>Total Hours Required</b>			<b>15</b>

<b><u>Social Activities</u></b>	<b><u>Number of Events</u></b>	<b><u>Hours per Event</u></b>	<b><u>Hours Available</u></b>
*Candidate Picnic	1	3	3
*Challenge Course 1 –Low Ropes	1	3	3
After Meeting Socials	12	1	12
Challenge Course 2 – High Ropes	1	3	3
*Meet the Officers Bowling	1	2	2
BAP/SAS Basketball	1	2	2
BAP/SAS Volleyball	1	2	2
*Mentor Mix	1	3	3
Mentor Mini-Golf	1	3	3
Mentor Board Game Night	1	3	3
<b>Total Hours Available</b>			<b>36</b>
<b>Total Hours Required</b>			<b>22</b>

\* Attendance Mandatory for all Candidates

*All points are subject to change*

# Candidate Scavenger Hunt

**Due Feb 1<sup>st</sup> 2012**

**Introduce yourself to the Beta Alpha Psi Adviser and have her sign below:**

\_\_\_\_\_

**Have five accounting faculty sign on the lines below:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

**Have the president and four other officers from Beta Alpha Psi sign on the lines below.**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

**Where is the Accounting Help Desk (room number)?** \_\_\_\_\_

**SARC offers Peer Tutoring for what accounting classes?** \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

**What is the BAP web address for the Epsilon Gamma Chapter?** \_\_\_\_\_

**Name each of the Big 4 Accounting Firms:** \_\_\_\_\_

\_\_\_\_\_

**What do the letters Beta, Alpha, and Psi denote?** \_\_\_\_\_

**Candidate Name (Please Print)** \_\_\_\_\_

**Pledge Signature** \_\_\_\_\_



This form, an official transcript, information forms, and your candidate dues (\$85) must be turned in at the BAP office (BA1 361) by February 1<sup>h</sup> 2012.



# Beta Alpha Psi

Candidate To-Do List

**Spring 2012**

**Due February 1st**

- Turn in Scavenger Hunt
- Turn in Candidate Information Sheet
- Turn in National Reporting Information Sheet
- Pay Dues (\$85) via Check or Paypal (No Cash Accepted)
- Turn in official transcript
- Turn in both challenge course forms ([www.bapucf.com/downloads](http://www.bapucf.com/downloads))
- Turn in Mentee Information Sheet
- Join the BAP Website ([www.bapucf.com](http://www.bapucf.com)); Access Key = capitalassets
- Consider joining a committee



# Beta Alpha Psi

Maintaining Membership

Spring 2012

To maintain Beta Alpha Psi Membership, members must;

- \*Maintain at least a 3.0 GPA (cumulative and major)
- \*Pay membership dues
- \*\*Meet Activity requirements
  - Attend at least 5 professional events
  - Attend at least 3 service event
  - Attend at least 2 social events

All events will be posted on the bap webpage: [www.bapucf.com](http://www.bapucf.com)

All graduating members that are in good standing will receive a Beta Alpha Psi chord the last meeting of the semester.

Any member that fails to meet the minimum requirement will be listed as "Under Probation" and will be subjected to the actions outlined in the chapter constitution.

Member Name: \_\_\_\_\_

Cumulative GPA: \_\_\_\_\_ Major GPA \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_

\* This form, a degree audit, information form and membership dues (\$40) must be turned in at the BAP office (BA1 361) by February 1<sup>st</sup> 2012.

\*\* Note that you must attend 10 total events (meetings count as either a professional or a social, not both).

*Epsilon Gamma Chapter*  
**BETA ALPHA PSI**  
The National Accounting Organization

**Information Sheet**

Beginning Date: \_\_\_\_\_ Expected Graduation Date: \_\_\_\_\_  
Graduate/Undergraduate: \_\_\_\_\_ Major: \_\_\_\_\_  
First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Permanent Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Local Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Special Dietary Needs (i.e. Kosher, Vegetarian, Food Allergies, etc....) *For Event Planning Purposes Only:*

\*\*Please hand this sheet in to Marc Yeager (Candidate Coordinator)



# Beta Alpha Psi

## Committee Information

Spring 2012

### Gold Status Video

#### Description

- Assist in helping our chapter achieve Gold Status, through the creation of a 10 minute video about the activities of our chapter
- Committee members will be responsible helping to design the creative concept of the video; record video; take, collect, and organize photos from the past two semester; assist in securing a location to film; editing the final product; and, other various tasks
- This committee will need to coordinate closely with the newsletter committee to ensure all proper documentation is collected throughout the semester
- Video editing experience is not required to be a member of the committee.

4-8 candidates/members are needed to write articles and take photographs

Contact Lindsey McCann at [president.bap.ucf@gmail.com](mailto:president.bap.ucf@gmail.com)

### Newsletter Committee

#### Description

- Contribute articles to the bi-annual Beta Alpha Psi newsletter, which will be available online to alumni and firms involved in our activities at the University of Central Florida Chapter.
- Committee members will be responsible for contributing 1-3 articles on the various Beta Alpha Psi activities, including professional, social, and volunteer activities. Once members and candidates have received the final calendar at the beginning of the semester, the committee will meet to discuss the content of the articles and the newsletter.
- Committee members should be able to provide interesting and easy-to-read articles. All articles will be reviewed and revised by the VP of Correspondence. Revisions will be submitted to the committee members for approval.
- The newsletter committee is also looking for contributing photographers to take photos at all Beta Alpha Psi events.
- Publishing experience is not required to be a member of the committee.

4-8 candidates/members are needed to write articles and take photographs

Contact Alicia Hasty at [vp.correspondence.bap.ucf@gmail.com](mailto:vp.correspondence.bap.ucf@gmail.com)

## **Technology Committee**

### **Description:**

- Ability to assist in testing website functionality
- Help create new design ideas
- Some experience in graphics design or coding preferred, but not required
- Meetings bi-weekly to discuss website related issues

3-4 candidates/members

Contact Artus Nemati at [vp.technology.bap.ucf@gmail.com](mailto:vp.technology.bap.ucf@gmail.com)

## **Community Service Committee**

### **Description**

- Assist in planning and execution of Relay for Life
- Attendance at least 3 adopt a road events
- Committee members should come ready to meetings to assist in brainstorming new service opportunities as well as how to improve past events
- Committee members will also be needed to assist the VP of Chapter Activities with additional situations as they arise

Unlimited number of members or candidates

Contact Aaron Blades at [vp.chapter.bap.ucf@gmail.com](mailto:vp.chapter.bap.ucf@gmail.com)

## **The Spring Banquet Committee**

### **Description:**

- Assist in the planning and execution of the Spring Banquet
- Must be available to help set up the Spring Banquet
- Committee members will need to help solicit donations for raffle prizes
- Committee members must also assist VP and Director in any last minute preparations

Unlimited number of members/candidates

Contact Victoria Barnett at [vp.bap.ucf@gmail.com](mailto:vp.bap.ucf@gmail.com)

## The Social Committee

### Description:

- Assist in the planning and execution of the mentor/mentee events
- Must be available to help set up the candidate picnic
- Committee members should attend meetings and contribute ideas
- Members should be social

2-4 members/candidates are needed

Contact Leif Bang at [vp.social.bap.ucf@gmail.com](mailto:vp.social.bap.ucf@gmail.com)

**\* The point disbursement will be based on the sole discretion of the officer, who will allot points based on performance and participation.**