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OVERVIEW

WHAT IS BETA ALPHA PSI?
Beta Alpha Psi (ΒΑΨ) is a national honorary organization for Accounting, and Financial Information students and professionals. The primary objective of the organization is to encourage and recognize scholastic and professional excellence in accounting and related fields. This includes promoting the study and practice of accounting, MIS, and finance, providing opportunities for self-development, associating with members and professionals, and encouraging a sense of ethical, social and public responsibility.

INSIGNIA
The emblem of the organization denotes the promise of the accounting profession. The rising sun signifies the profession as one rising even 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.

HISTORY OF BETA ALPHA PSI
The Beta Alpha Psi national organization was founded in 1919. There are over 300 chapters on college and university campuses with over 300,000 members initiated since Beta Alpha Psi's formation.

San Diego State University founded the Beta Eta Chapter in 1960.

CHAPTER AND NATIONAL CONSTITUTION AND BYLAWS
The Beta Eta Chapter Bylaws and National Beta Alpha Psi Constitution and Bylaws are available to all candidates and members on our website: bay.sdsu.edu
MEMBERSHIP BENEFITS

300+ Chapters and Growing!
At every school, a local chapter is made up of student and faculty members. Student officers guide a chapter’s activities and operations, which are all overseen by faculty advisers.

Professional Reputation
Beta Alpha Psi is recognized and respected by the business community as a premier collegiate organization. The reputation of Beta Alpha Psi can open doors to outstanding career opportunities in the fields of finance, accounting and information systems. Potential employers know that when they see Beta Alpha Psi on a resume, they are getting the best!

Bonding Through Activities and Service
As a member of Beta Alpha Psi, you will have ongoing opportunities to participate in campus and community service activities. Service activities include participating in fundraising projects for charity, voluntary tutoring and assisting in the Volunteer Income Tax Assistance program.

Communication Skills
Through numerous chances to make presentations at local high schools and introductory college classes, as well as at annual and regional meetings, Beta Alpha Psi members will develop strong communication skills.

Scholastic Achievement
Academic excellence is not only welcomed, it is expected. Beta Alpha Psi requires its members to maintain at least a 3.25 GPA.

Mentors
At many chapters, each Beta Alpha Psi member has a mentor. In the mentor program, Beta Alpha Psi alumni are assigned to new members and pledges, so you can benefit from their experience and advice. Their support can also help you maintain a high level of academic achievement. The Beta Alpha Psi mentor program ensures someone will always be there for you throughout your college career — and beyond.

Enhanced University Experience
Membership in Beta Alpha Psi is a wonderful and rewarding way to meet like-minded people who share many of the same goals and interests that you do.

Networking Opportunities
Members are also able to develop professional friendships and relationships through various networking activities. These include field trips to companies and firms, attending joint meetings with professional organizations, and service activities.

Future Contacts
Overall, Beta Alpha Psi is a tremendous way to interact with professionals and future professionals from whom you may later wish to seek employment. It is also a great way to
develop strategic contacts and relationships with faculty members who can provide good potential job sources and references.

**AN INTERVIEW WITH A BETA ALPHA PSI ALUMNI**

**Why did you get involved with Beta Alpha Psi (be honest)?**

On the first day of my intermediate accounting class, BAP officers came to talk about the organization's purpose and its benefits. I decided that I would attend the informational (and to get free pizza). The informational convinced me that Beta was definitely one of the top organizations to join if I was serious about exploring the opportunities within the financial information profession. After 2 semesters of involvement, I decided that I would like to become an officer to make more of an impact on our campus and within our community, and the rest is history.

**What did you learn from your involvement in Beta Alpha Psi (be specific and give examples of projects or events)?**

One of the most significant takeaways from my involvement in Beta Alpha Psi was that there are a lot of smart people within Beta, and that being smart is not enough. Being passionate about whatever career or other activities you're interested in is what really makes you stand out within BAP. Beta also really helped me develop as a leader on my campus and gain more confidence in my abilities as a young professional.

**What is something you got out of Beta Alpha Psi that you did not expect?**

I would have never thought that I would have made as many significant friendships as I did during my time in BAP. I am actually in a wedding for one of the friends this fall with 3 other BAP members. I have also developed some really good relationships with the faculty that has continued after school.

**How has your experience in Beta Alpha Psi influenced/helped advance your career?**

Beta Alpha Psi has significantly influenced my career. Through the relationships I have been able to make within Beta, I was able to find several mentors. These mentors have helped me establish goals for myself within my careers, as well as helping me evaluate my progress towards those goals.

**What have been the biggest challenges in your career?**

I'm still new to my position, so everything is "challenging" as I transition from a student to professional. I'm just trying to soak in as much as possible in order to excel in my career.

**What should current students in Beta Alpha Psi do to increase the value they obtain from the organization?**

I would encourage members to immerse themselves in the organization's activities: take on leadership positions; attend Annual and Regional Meetings; and not to be afraid to meet people (both collegiate members and professionals). It's also not enough just to "meet" people, but try to develop as many relationships as possible.
MEMBERSHIP REQUIREMENTS

Membership in Beta Alpha Psi includes those persons of good moral character who have achieved scholastic excellence in accounting, MIS, or finance, and who have been initiated according to the ritual after one candidate semester. The requirements of candidates are listed below.

Undergraduate Candidate

• Declared Accounting, Finance or MIS major
• Based on major, enrolled in Accounting 202
• 3.25 GPA in upper division major courses (e.g. “ACCTG” courses only)
• 3.25 overall GPA or 3.5 in most recent 30 units

Graduate Candidate

• Declared Accounting, Finance, or MIS major
• Enrolled in 6 units of graduate study in your major.
• 3.25 for graduate level courses in declared major
• 3.25 Overall GPA

Undergraduate Candidate Apprentice

• Declared Accounting, Finance or MIS major
• Be enrolled in Accounting 202 or if Finance or MIS major must be enrolled in 3 units of courses required for the major but not those courses required by all Business majors (i.e. Accounting 201 & 202, BA 323, MIS 301, BA 360)
• Have completed at least one year of collegiate courses
• 3.25 major GPA or a 3.25 SDSU overall GPA; if no SDSU overall GPA exists then a minimum overall GPA of 3.25

Graduate Candidate Apprentice

• Declared Accounting, Finance, or MIS major
• Be enrolled in at least 6 units of graduate study in your major beyond the core business classes.

NOTE: A Candidate Apprentice is not required, but rather encouraged to participate in various Beta Alpha Psi events throughout the semester. If at the end of the semester the apprentice has completed all required candidate activities and meets the GPA membership requirement, he or she may be initiated as a member. If at the end of the semester the apprentice meets the
GPA requirement but did not have time to complete the other required candidate activities, he or she will advance to candidate status.

**Dress Code**

Professional activities, including the ΒΑΨ Spring Awards Banquet, Meet the Firms, and weekly meetings are specified to be business casual or professional dress. Exercise good judgment by displaying a neat, professional appearance at all times during these events. Business casual is appropriate for weekly meetings.

Business casual can be characterized as a classic, simple look with business professional overtones. Pressed long-sleeve collared shirts and khakis or dark slacks are standard for men and women. The rule of thumb for men’s belts should match the color of the shoes and the socks should match the color of the slacks. Women may also wear skirts at an appropriate length.

It is important to pay attention to the fit of your clothing and the message your dress communicates to professionals. Jeans, shorts, cut-offs, revealing or ribbed tank tops, and T-shirts are not appropriate business casual wear.

If you are unsure about a particular item, it is best to practice conservatism. An easy test you can apply is as follows: *When in doubt, leave it out!*
FAQs

"I'm worried about the time commitment necessary to meet the pledge semester requirements. In your experience, how difficult is it to meet these requirements?"

Membership in Beta Alpha Psi does require a significant commitment, but only if you wish to maximize your experience. Our minimum requirements for Active Status are easily attainable, even for those with a full class load and a job. There are plenty of opportunities to meet the requirements without putting undue stress on your schedule. All in all, you may have to devote 2-4 hours per week to achieve Active Status.

"I'm already a member of SAS or ALPFA, what are the benefits to becoming a member of Beta Alpha Psi as well?"

Being a member of both Beta Alpha Psi and SAS allows you to have increased exposure to recruiters. Firms are on a rotational schedule so there is no overlap in the companies you will see. Additionally, some activities may count towards active status in both organizations.

"I have heard that the dues for Beta Alpha Psi are expensive. Is that true?"

Candidate dues for your pledge semester in Beta Alpha Psi are $140. As a national organization, we are required to pay $55 of these fees to the national Beta Alpha Psi office.

There are a number of benefits that go along with being a chapter of a national organization. Additional opportunities include: regional and national conferences, competitions, and widely-recognized prestige.

Following your pledge semester as a candidate, regular semester dues for members are $85. These dues help fund numerous activities including: socials, professional meetings, and community-building initiatives like our financial literacy program. Also, members and candidates both attend Meet the Firms (fall semester) or the Spring Banquet (spring semester) at no additional cost.

"Specifically, what opportunities do you have for me to gain leadership experience?"

Our chapter of Beta Alpha Psi is run by student executive officers under the guidance of our faculty advisor. These officers are elected through a formal election process at the end of each semester.

There are also a number of support committees comprised of both pledges and members.
These committees must elect a chair to preside over committee meetings and report to the designated officer.

"I have been invited to/have joined other honors societies already. What makes Beta Alpha Psi more than just 'another line on the resume'?

Beta Alpha Psi is an active, engaging and highly dedicated organization with participation requirements to both become a member and to remain in active status. Candidates, members, and alumni get to know each other in both a professional and social setting. New candidates and members can expect to learn critical networking, interviewing, and general recruiting skills and techniques.

"What does 'Active Status' mean to employers?"

Making Active Status, while important for all members, does not guarantee you anything during the recruiting process. You need to be able to speak to your peers, professionals and potential employers about what you did during your membership. What projects did your committee(s) work on? How did you contribute to the success of the chapter? In what ways did you add value to future members? How did you impact the community? What you should focus on is maximizing your Beta Alpha Psi experience.

What is meant by this, in a nutshell, is that you want to make a name for yourself during your time as an active chapter member. You should strive to create meaningful experiences from which you can facilitate your professional growth and pursue your career ambitions. Perhaps most importantly, you need to focus on establishing and sustaining relationships which will benefit you and others long after you leave SDSU. And that will require quite a bit more time than 2-4 hours per week.

Simply put, being a member of Beta Alpha Psi just isn't "enough" in the eyes of employers. They already know you have the grades. What they want to see is that you have the ambition, drive, desire and personality to succeed in a dynamic, fast and client-driven industry. They want to see that you have that extra "something" that will add value to their clients and their team.

If you have any questions of your own, feel free to contact our:

Chapter President, Huslen Munkhbaatar, at BAPBetaEta.President@gmail.com, or VP of Reporting, John Poptanich, at BAPBetaEta.Reporting@gmail.com.
To attain active status for the semester, each member, candidate, and candidate apprentice must complete the following tasks. Only participants obtaining active status will have a profile included in the Directory. All others will be shown by name only, as an inactive participant.

All of these requirements MUST be met and reported by the end of the semester to obtain active status. An end of semester active status member list will be available the week leading up to this deadline, for all participants to review, request corrections, and submit updates. This deadline shall be announced prior to the end of the semester. No further exceptions or changes will be accepted after this date.

**DUES**

Pay dues of $85 for Members or $140 for Candidates and Candidate Apprentices. The deadline to pay dues shall be announced at a Chapter meeting. Please note that the dues for Candidates and Candidate Apprentices include a one-time fee paid to our National chapter. Dues are non-refundable.

**ICEBREAKER SOCIAL (TBD)**

Come get to know members of Beta Alpha Psi and sign up for committees.

**Spring Leadership Connection (Spring Event)**

Attend Spring Leadership Connection to network with professionals on February 15th, 2019.

**SOCIAL EVENT (TBD)**

Join us and get to know other members and officers!

**OFFICER ELECTIONS AND INITIATION CEREMONY (End of Semester)**

Attend the Beta Alpha Psi elections and initiation ceremony tentatively scheduled for May 8th, 2019.

**PROFESSIONAL MEETINGS**
Attend five (5) BAΨ Professional Meetings during the semester. A professional meeting shall be defined as a fifty (50) minute presentation or activity that is professional in nature and has a professional program.

COMMUNITY SERVICE

Fulfill the community service requirements of ten (10) hours for members, or fifteen (15) hours for candidates and candidate apprentices. You may submit up to five (5) non-BAΨ community service hours to go towards meeting this requirement. Any non-BAΨ community service hours must be reported, in writing, to the VP of Reporting by the end of the month in which they occur, or the deadline for active status, whichever is sooner. You must obtain verification of your participation in any such event.

Tutoring is limited to half of your respective community service requirements (five (5) for members or seven (7) for candidates and candidate apprentices).

Please note that a “no-call, no-show” to any community service event may result in disqualification from Active and Outstanding Status. Please call and let the officer in charge know (at least 24 hours before the event) if you cannot make it, for whatever reason. Contact information for all the officers is located in the back of the informational handbook.

COMMITTEES

In addition to the above requirements, each candidate/candidate apprentice must serve as a committee member. Please note that failure to reasonably assist with duties throughout the semester may, at the discretion of the Executive Committee, result in forfeiture of active status.

ACHIEVING OUTSTANDING STATUS

All of the above requirements must be completed in addition to attending an additional three (3) BAΨ, or Non-BAΨ professional meetings, participating in a total of twenty (20) hours of community service (only five (5) hours of which may be from non-BAΨ community service events), and completing two (2) of the following options:

1. Serve as committee Chairperson.
2. Actively participate in the PAL program, as defined by the PAL program guidelines on page 14 of the informational handbook.
3. Be nominated and Campaign (including speech) for an officer position.
4. Attend a total of ten (10) Professional Meetings.
5. Tutor an additional three (3) hours (above and beyond the 20 community service hours required for Outstanding Status).
NOMINATIONS, SPEECHES AND ELECTIONS

We encourage all members to get involved and run for an officer position. At the end of each semester, the membership elects officers to serve in the following semester. Each position lasts only one semester, except President-Elect and Treasurer, which last for one year each.

This semester, Nominations for the Fall 2019 Beta Eta officers will tentatively be held on May 1, 2019. Campaigning will continue until May 8, 2019 when speeches will take place at the special elections meeting. At this meeting, candidates will be initiated and we will vote on officers for Fall 2019.

Members of the current Executive Board are available to provide interested chapter participants with important information, insight and candor. We strongly advise that those participants who are interested in running for office get involved in chapter activities and committees, and to discuss the duties and responsibilities of an office with the current officer and our faculty advisor. If you think you might be interested, come see us!

LOCAL CHAPTER ACTIVITIES

Professional Meetings
This semester, we will hold our professional meetings on Wednesdays at 12:30 P.M. in the Pride Suite at the Conrad Prebys Aztec Student Union. In addition, in order to meet the needs for members and candidates who cannot attend Wednesday meetings, we will hold professional meetings on select Saturdays. These locations are subject to change, and any changes will be announced in a timely manner. The meetings are usually presentations by national, regional, and local professional business firms and range in topics from industry specialization to ethics discussions.

Chapter Workshops
Meetings dedicated to chapter administration that do not meet the definition of a Professional Meeting include, but are not limited to, meetings held for Orientation, Nominations, Speeches or Elections.

Spring Awards Banquet
The Chapter hosts the Spring Awards Banquet each spring semester where the Charles W. Lamden School of Accountancy honors scholarship and awards recipients. The event also allows networking and interaction among local area professionals, faculty and chapter members.

Community Service
We donate our time to charitable functions by participating in community service events. Beta Eta has participated in feeding the underprivileged at St. Vincent de Paul, Juvenile Diabetes Walk, the Muscular Dystrophy Association, and tutoring. Our chapter also participates in the IRS Volunteer Income Tax Assistance program (VITA) in the spring semesters. Beta Eta has also developed a Financial Literacy program to help arm children and young adults with valuable life skills in the areas of budgeting, savings and college investment.

Other Chapter Activities
Social events, firm tours and/or field trips are held throughout the semester. Some of these events will provide opportunities to interact with local professionals. Past social activities include bowling tournaments, Padres baseball games, kickball in the park, and barbecues.

National Activities
Annual Meeting
The Beta Alpha Psi National Convention is held annually during the summer. Members are highly encouraged to attend. The Annual Meeting provides opportunities to network, attend workshops, and participate in national-level competitions, such as the Best Practices Competition and the “Project Run With It” competition. More information on the meetings can be found at the BAΨ National website: www.bap.org.

Superior Chapter Status
As part of Beta Alpha Psi’s status as a national organization, we must meet certain point requirements for the National Chapter. Our chapter earns points for participating in activities such as organizing social events, volunteering for community service projects and attending weekly meetings. The point system is structured to encourage the individual chapters to meet the organization’s objectives of self-development, ethical behavior, and social responsibility. Chapters that excel, as measured by points, are recognized at the annual National Convention and are designated “Superior” chapters. Our chapter has been awarded Superior Status consecutively since fall 1991.

Gold Challenge
The Beta Eta chapter was one of fourteen Beta Alpha Psi chapters to receive the first annual Gold Challenge Award in August 2009. For the second consecutive year, the Beta Eta Chapter recently won the Gold Challenge Award in August 2010 at the Beta Alpha Psi National Convention. The Gold Challenge, sponsored by KPMG, is an achievement that recognizes and honors those chapters who go above and beyond the requirements for Superior Status. To be eligible for the award, chapters must (1) be a Superior Chapter for the last two years, (2) have
participated in a Regional Meeting, (3) participated in a National Meeting. Additionally, each chapter must submit a 10-minute video which explains and/or demonstrates why their chapter deserves the KPMG Gold Challenge Award. Details about the award can be found at www.bap.org/compGold.aspx.

COMMITTEES

All candidates are required to actively participate in at least one committee. These committees will meet about once a week to work on their projects.

Community Service Committee

Members of this committee will assist our VP of Planning in the planning and execution of community service events. Each Beta Alpha Psi member is required to do a certain number of community service hours each semester, so it is essential that members are provided with enough opportunities to fulfill this requirement. Members of this committee will spend time searching for possible events and assisting in recording member participation at events.

Professional Activities Committee

The Professional Activities Committee will aid the Kristine Chacon, our VP of Professional Development in the delivery and setup of food at our Professional Meetings on Wednesdays and Saturdays. The committee will be responsible for escorting speakers from the parking lot to the meetings.

Gold Challenge Committee

This Committee will document our chapter’s events and community service. At the end of the semester they will compile the video and photos into a competitive video that will be submitted to Beta Alpha Psi Nationals.

Best Practices Committee

Best practices are activities created and completed by a chapter to further specific goals identified by the board of directors of Beta Alpha Psi and by Deloitte LLP (Deloitte). These
activities exemplify the spirit and purpose of Beta Alpha Psi and, if applicable, allow other chapters to emulate those activities.

**Leadership and Management**
Leadership and management are very different but both are critical to success. How does your chapter define Leadership and Management based upon your chapter philosophy? What has your chapter done in the past year to differentiate or combine the two traits into your chapter activities? How have you prepared your members for both? Finally, how does your chapter measure its success in promoting Management and Leadership? What take away can your chapter provide other chapters in this topic?

**Alignment of Officer Activities**
Each chapter needs to align performance, efforts and goals in order to lead the chapter effectively. This includes delegating through different activities such as professional, service and social activities. Provide the overall organizational structure for your chapter leadership and define the roles and responsibilities for each officer position. What forms of communication does your chapter use to avoid “working in silos”? Who is responsible for delegating responsibilities and why? How has your officer alignment changed or evolved over the past three years? What were some of the lessons learned from past mistakes? What were some of the successes? What is your chapter currently doing to keep your leadership/officer alignment dynamic?

**Good or Great!**
Sometimes the good can get in the way of great. What does your chapter do to evaluate their processes to avoid settling for good in order to strive to be great? BAP has been around since 1919. The organization, the mission and the scope has changed and will continue to change. This is why BAP remains one of the more prestigious student organizations within the US and Globally. Provide examples of what your chapter has done to venture outside of its comfort zone to include new and different ideas. Provide some examples that other chapters can benefit from. What has your chapter done to reach out to potential new members such as finance and IS majors? What review process has your chapter used to answer the question, “Are we good or are we great?” In the structure of your organization, what allows you to move forward?
Faculty Advisor

“\textit{It is my pleasure to serve as the faculty advisor, and I enjoy the opportunity to work with, guide, and mentor such a great group of future professionals. Beta Alpha Psi plays an important role in the development of our students. I thank you all for your dedication and hard work towards making our Beta Eta Chapter one of the best chapters in the nation,}”

Paul Sager
psager@sdsu.edu
Dear Members and Candidates:

Welcome to the Beta Eta Chapter of Beta Alpha Psi at San Diego State University. I am pleased to serve as the faculty advisor and continue the standard of excellence set under my predecessors, Drs. Brett Kawada and David DeBoskey. Our Beta Eta Chapter is one of the most outstanding chapters in the nation. We’ve received the Superior Chapter award for three consecutive decades, and our students have competed and won Beta Alpha Psi competitions at the regional and national levels.

As an honor organization, candidates and members of the Beta Eta Chapter represent the best of the SDSU’s Charles W. Lamden School of Accountancy. The Chapter leadership will plan activities to help you prepare to become a professional accountant. In addition to networking with prospective employers, you have the opportunity to give back to our community and develop life-long friendships. Your professional skills will be enhanced through workshops and participating in the regional and national competitions. I encourage you to participate in as many events, activities and competitions as possible.

As faculty advisor, I accept the challenge of supporting a student organization that holds itself to such high standards.

Sincerely,

Paul Sager
Assistant Professor
Faculty Advisor
President

Matthew Kerr
BAPBetaEta.President@gmail.com

The president leads the chapter to excellence. He is responsible for the duties of the other officers and to follow the national and chapter bylaws. The president also leads the executive and chapter meetings every week. This elected position lasts for two consecutive semesters. The officer begins the first semester as the president-elect to learn the responsibilities and becomes president for the following semester.
The President-Elect assists the President in his duties and assists other board members with various tasks. This elected position lasts for two consecutive semesters. The officer begins the first semester shadowing the President to learn the responsibilities and becomes President for the following semester.
Treasurer

Victor Syvolapov

BAPBetaEta.Treasurer@gmail.com

The treasurer maintains the chapter's financial records through the use of Quickbooks and financial statements. He reports the financial status of the chapter to the members. He also plans all fundraising activities for the chapter.
VP of Professional Development

James Knape

BAPBetaEta.Professional@gmail.com

The VP of Professional Development maintains contact with all professionals in order to schedule speakers for the weekly meetings. He is also responsible for bringing the refreshments to the meetings.
VP of Communications

Sandra Gong
BAPBetaEta.Communications@gmail.com

The VP of Communications maintains current information and communications for Beta Alpha Psi. This includes updating the chapter’s brochure, flyers, and postings. The VP of Communications sends regular emails about upcoming meetings, events, and opportunities.
VP of Reporting

Ross Webster

BAPBetaEta.Reporting@gmail.com

The VP of Reporting maintains records for Beta Alpha Psi. He keeps track of all Candidate and Member attendance and community service hours.
VP of Planning

Robabeh Vahedimanesh

BAPBetaEta.Planning@gmail.com

The VP of Planning is responsible for organizing tutoring for accounting and finance students. She is also responsible for scheduling the community service events for members and candidates to meet their community service hours requirement.