

Beta Alpha Psi



Epsilon Psi Chapter

*An International Honors
Organization for
Financial Information
Professionals*

Candidate Packet

csuebbap.club

Contact Information

| | |
|--|---|
| <p>Faculty Advisor Qs about academic eligibility and transcripts</p> | <p>Ching-Lih Jan chinglih.jan@csueastbay.edu</p> |
| <p>Faculty Advisor Qs about academic eligibility and transcripts</p> | <p>Pei-hui Hsu pei-hui.hsu@csueastbay.edu</p> |
| <p>President General Qs</p> | <p>Georgia Sono and Taren Rodriguez-Colby president.csuebbap@gmail.com</p> |
| <p>Executive Vice-President Qs about main events & tabling</p> | <p>Howard Do execvp.csuebbap@gmail.com</p> |
| <p>Vice President of Professional Development Qs about technical seminars & office visits</p> | <p>Lorenzo Cuevas vpprofd.csuebbap@gmail.com</p> |
| <p>Chief Financial Officer Qs about dues & fees</p> | <p>Caitlyn Merriman cfo.epsilonpsibap@gmail.com</p> |
| <p>Chief Information Officer Qs and suggestions about website</p> | <p>Nihal Jayan cio.csuebbap@gmail.com</p> |
| <p>National Reporting Officer Eligibility worksheets and transcript submissions</p> | <p>Priscilla Lopez nro.csuebbap@gmail.com</p> |
| <p>Vice President of Candidates Qs about pledging and requirements</p> | <p>Kathryn Muser vpcandidates.csuebbap@gmail.com</p> |
| <p>Vice President of Events Qs about the socials & community service</p> | <p>Belinda Haines Vpevents.csuebbap@gmail.com</p> |
| <p>Major Events Chair Assists Executive VP with major events</p> | <p>majoreventchair.csuebbap@gmail.com</p> |
| <p>Publicity Chair Maintain social media accounts, assists CIO</p> | <p>publicity.csuebbap@gmail.com</p> |

| | |
|--|---|
| <p>Finance Director Assists CFO with fees and reimbursements</p> | <p>finance.csuebbap@gmail.com</p> |
| <p>Tutoring Chair Qs about tutoring</p> | <p>tutoring.csuebbap@gmail.com</p> |
| <p>Alumni Relations Chair Maintain relationships with alumni</p> | <p>alumni.csuebbap@gmail.com</p> |
| <p>Competition Chair Assists in all competition related activities</p> | <p>membership.csuebbap@gmail.com</p> |
| <p>Community Service Chair Assists with Community service events and attendance</p> | <p>communityservice.csuebbap@gmail.com</p> |
| <p>Candidates Chair Deals with many new candidates/Helps VP of Candidates</p> | <p>candidateschair.csuebbap@gmail.com</p> |



Beta Alpha Psi | Epsilon Psi Chapter
International Honors Organization
Accounting | Finance | ITM |
California State University East Bay

BAP Membership Information Due

Due By Friday, September 9th 2022!

To VP of Candidates (vpcandidates.csuebbap@gmail.com):

- Candidate Dues of \$75+tax via cash, check or Eventbrite (link at bottom of page)
- [Tutor Availability](#) (Page 7)
- [CSUEB Individual Release Form](#) (Page 8)
- [KPMG Gold Challenge - Individual Release Forms](#) (Page 9)
- [Candidate Agreement](#) (Page 10)
- [Bylaws Agreement](#) (Page 11)

To Faculty Advisors:

- [Academic Eligibility Form](#) (Page 12)
- Unofficial Transcript send to Dr. Hsu at pei-hui.hsu@csueastbay.edu

****No refunds after names are submitted to the national office****

Due by Friday, September 30th, 2022 To vpcandidates.csuebbap@gmail.com

- AACE approved Resume
- LinkedIn Profile

How to obtain an AACE approved resume?

1. Make an appointment with the AACE office at jesse.foster@csueastbay.edu and attach your resume with your request.
2. Get it approved by the advisor by asking them to sign your final resume
3. Email me after you get the final resume approved at: vpcandidates.csuebbap@gmail.com.

Link: <https://www.eventbrite.com/e/fall-2022-candidate-dues-tickets-411763424487>



Beta Alpha Psi | Epsilon Psi Chapter
International Honors Organization
Accounting | Finance | ITM |
California State University East Bay

Requirements for Candidates

Invest ~28-34 hours & you can complete your full semester candidacy! It seems like a lot for a semester, but you will learn **soft skills, technical skills, and gain a network of professionals** who will help you in the long run!

- Attend **Candidate Summit** (September 2nd, 2022)
- Attend **Meet the Firms (MTF)** (September 16, 2022) 5-7:30pm
- Attend **7 virtual** technical seminars or workshops hosted by BAP
- Attend at least **2** virtual/in-person BAP socials
- Complete **10** community service hours
- Complete **2** Classroom announcements with general information about Beta Alpha Psi and our chapter's website (csuebbap.club) **Making more is always encouraged!!**
 - Receive AACE approval of your **resume & LinkedIn Profile** then submit to VP of Candidates via email. (First Semester Candidates only)
- Payment of **\$75**
- **3.0** cumulative & **3.2** major GPA



Beta Alpha Psi | Epsilon Psi Chapter
International Honors Organization
Accounting | Finance | ITM |
California State University East Bay

Classroom Announcement Tips

One of the most feared things in the world along with spiders and heights is public speaking, yet in most business courses you will have at least one presentation in every class. Luckily you have us to provide you with the tools you need to not only improve your public speaking, but also to excel at it. Here are a few basics you should follow to improve your speeches.

For everything:

- **Keep it short and simple.** It's usually hard to get the attention of an audience present for a different purpose, so give your speech in quick, short, concise points. Shoot for less than five minutes.
- **Play to your strengths.** If you are particularly good at a speech technique, use that. There is no one way to give a good announcement. As long as the message is received, the audience doesn't care how you do it
- **Become familiar as possible with the topic at hand.** It is always a good idea to memorize what you have to say. At BAP, we can provide you with a PPT and maybe even some flyers to hand out.
- **Speak with confidence.** If you aren't confident in what you're saying, your audience won't be confident in your message.
- **Deliver it with a partner.** Sometimes all it takes to soften your nerves is the calming presence of a friendly person. It can also be a good bonding activity.

For BAP:

- **Let your audience know where to find more information.** Either legibly write our website on the board (csuebbap.club) or tell your audience to take pictures of it on the last slide of the PPT, or both.
- **Be sure the professor knows you're coming. Email them first!** Not only would it be rude to show up unannounced, it would tear away at the professionalism associated with BAP that we try so hard to maintain and improve
 - The email should include who you are representing, why you are announcing, and how much time you need.Most importantly, have fun talking about Beta Alpha Psi! **Use your time to practice talking and persuading someone to join BAP.** One day you will be persuading your boss to give you a raise so now is the time to practice! Feel free to ask us questions at any time; We're here to help. Good luck!



Beta Alpha Psi | Epsilon Psi Chapter
 International Honors Organization
 Accounting | Finance | ITM |
 California State University East Bay

Tutoring Availability Form

Name _____ Net ID _____

Phone _____ Email _____

This

opportunity is a great way of giving back to the community and meeting new friends. If you ever miss any requirements, you may be eligible of making those requirements up by tutoring.

Please write the course in the time slot for classes/times you are available to tutor:

ACCT: 210, 215, 302, 311, 312, 320, 321, 325, 331, 335, 340, 341, 370, 411, 421, 422, 423, 424, 432, 433, 435, 490

FIN: 300, 405, 410, 420, 430, 435, 445, 460, 470, 475, 480, 482, 484, 486, 488, 490

ITM: 330, 331, 332, 336, 338, 398, 440, 442, 446, 448, 449, 490, 497

Please indicate the times that you agree to show up for the shift. A shift with your availability will be assigned to you.

Please return to Tutoring Chair at: tutoring.csuebbap@gmail.com.

| Time | Monday | Tuesday | Wednesday | Thursday | Friday |
|----------|--------|---------|-----------|----------|--------|
| 10:30 am | | | | | |
| 11 am | | | | | |
| 11:30 am | | | | | |
| 12 pm | | | | | |
| 12:30 pm | | | | | |
| 1 pm | | | | | |
| 1:30 pm | | | | | |
| 2 pm | | | | | |
| 2:30 pm | | | | | |
| 3 pm | | | | | |
| 3:30 pm | | | | | |
| 4 pm | | | | | |
| 4:30 pm | | | | | |
| 5 pm | | | | | |
| 5:30 pm | | | | | |



**Beta Alpha Psi
Epsilon Psi Chapter
California State University East Bay
Individual Release Form**

**Consent and Authorization to Use Specific Personally
Identifiable Information in External Publications**

This Consent and Authorization is given for the benefit BAP – Epsilon Psi for the use of certain personally identifiable information about me, including a picture or video depicting some or all of such personally identifiable information (which may include disclosure of my age, race, gender and ethnic background) in external publications, including internet websites. The information may only be used for positive marketing purposes.

- I acknowledge that I have reviewed and understand the information in this Consent Authorization regarding the requested personal data and the manner and purpose in which it will be used.
- I am aware that I am not obliged to give my consent and authorization, that I will not suffer any prejudice from refusing to give such consent and authorization, and that I may withdraw my consent and authorization with regard to future use at any time.
- I consent to the use of my personal data in the manner set forth. Any extension of such use or the repurposing of the material containing my personally identifiable information will require my further consent and authorization.
- I have the right at any time to request that my personal data to be removed or discontinued within a reasonable time period, one month after signing.

This Consent and Authorization shall remain valid and in force until I request that my Personal Data be removed.

Name/Title: _____

School and Chapter: _____

Signature: _____

Date: _____



KPMG Gold Challenge - Individual Release Form

Consent and Authorization to Use Specific Personally Identifiable



Information in External Publications

This Consent and Authorization is given for the benefit of KPMG LLP (Sponsor) and BAP (Organizer) for the use of certain personally identifiable information about me, including a picture or video depicting some or all of such personally identifiable information (which may include disclosure of my age, race, gender and ethnic background) in external publications, including internet websites. The information may only be used specifically in connection to the KPMG Gold Challenge.

- I acknowledge that I have reviewed and understand the information in this Consent Authorization as well as the KPMG Gold Challenge Guidelines regarding the requested personal data and the manner and purpose in which it will be used.
- I am aware that I am not obliged to give my consent and authorization, that I will not suffer any prejudice from refusing to give such consent and authorization, and that I may withdraw my consent and authorization with regard to future use at any time.
- I consent to the use of my personal data in the manner set forth and as described in the KPMG Gold Challenge Guidelines. Any extension of such use or the repurposing of the material containing my personally identifiable information will require my further consent and authorization.
- I have the right at any time to request that my personal data as used in the manner set forth and described in the KPMG Gold Challenge Guidelines be removed or discontinued within a reasonable time period.

This Consent and Authorization shall remain valid and in force until I request that my Personal Data be removed.

Name/Title: _____

School and Chapter Name: _____

Signature: _____

Date: _____

****Note: Each member and candidate that participated in the video must complete and submit a KPMG Gold Challenge Release Form.***



Beta Alpha Psi | Epsilon Psi Chapter
International Honors Organization
Accounting | Finance | ITM |
California State University East Bay

Candidate Agreement

“Beta Alpha Psi will shape the financial and business information professions by developing members into ethical, professional, and confident leaders.”

Our Mission

“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.”

Adapted from WWW.BAP.ORG

Professional Codes

1. I will dress and act appropriately during all Beta Alpha Psi events.
2. I will respect others and ask appropriate questions during all Beta Alpha Psi events.
3. I will maintain a professional relationship with everyone and discuss any issues with officers to ensure safety of myself and others.
4. I will show respect and act professionally while meeting recruiters and employees from other firms as I acknowledge that **I am not only representing Beta Alpha Psi-Epsilon Psi Chapter** at California State University East Bay, but **I am also representing California State University East Bay**.
5. I will treat my fellow members and candidates with respect and will not associate in any illegal activity and inappropriate behavior.

Ethical Behavior Codes

1. I will fulfill the requirements to keep my membership active and communicate any issues with the appropriate officers.
2. I will read the Bylaws and refer to them when necessary.
3. I will attend events that I have signed up for and communicate if I cannot make it. 4. I will ask for support whenever I need it especially during major events where many people will rely on me.
5. I will always be loyal to my priorities and communicate to appropriate officers about any change in commitment.

Name: _____

Email: _____

Signature: _____

Date: _____



Bylaws Agreement Statement

Date: _____

I, _____, have read and understand the NATIONAL BY-LAWS OF BETA ALPHA PSI, Epsilon Psi Chapter California State University, East Bay. I understand the depth and level of commitment required to become a member of Epsilon Psi Chapter of the National Accounting Fraternity, Beta Alpha Psi. I further pledge to work and contribute so as to attain and preserve the Superior Chapter status of the Epsilon Psi Chapter of Beta Alpha Psi.

Candidate Name

(Print) _____

Signature _____

President

Name (Print) _____

Signature _____

Academic Eligibility Worksheet

I, *(please print clearly)* _____, authorize the Faculty Advisor of Beta Alpha Psi, Epsilon Psi Chapter to review the required grade point averages as part of my application to the National Headquarters for the membership in Beta Alpha Psi.

To complete your academic eligibility check, please answer the following questions:

1. Have you declared the option of Accounting, Finance, or Information Technology Management in the College of Business and Economics (CBE) at CSU, East Bay? If yes, please check one:

ACCT **FIN** **ITM** *You must verify your option status with the CBE-Student Service Center (VBT 129)

2. If you are a graduate student, skip this step and go to **step 3**. If you are an undergraduate student, please complete the following:

2.1 Please check your academic standing **Freshman** **Sophomore** **Junior or above**

2.2 Have you attained at least an overall cumulative average GPA of 3.0? **Yes** / **No**

2.3 List all the *UPPER* division courses (see qualifying courses below*) in your area of concentration beyond the business core that you took or are taking this semester and calculate the GPA below.

| Identify the Semester you completed/ | <u>Course Number</u> | <u>Grade</u> | <u>X</u> | <u>Units</u> | = | <u>Points</u> |
|--|-----------------------------|---------------------|-----------------|---------------------|----------|----------------------|
| <u>or are currently taking coursework</u> _____ | | | | | | |
| _____ | _____ | _____ | X | _____ | = | _____ |
| _____ | _____ | _____ | X | _____ | = | _____ |
| _____ | _____ | _____ | X | _____ | = | _____ |
| _____ | _____ | _____ | X | _____ | = | _____ |
| _____ | _____ | _____ | X | _____ | = | _____ |
| _____ | _____ | _____ | X | _____ | = | _____ |

Note: Academic qualifications to declare candidacy into BAP require that you be a student who has declared ACCT, FIN, or ITM as your concentration. In addition, your cumulative GPA must be 3.0 or above and you must have enrolled in at least one of the qualifying major courses listed below with an average major GPA of 3.2 or better. An up to date unofficial transcript with current semester results must be submitted to the Faculty Advisor to review your eligibility for candidacy and initiation

3. Please staple your unofficial transcript (**highlighting all qualifying courses**) to this Academic Eligibility Worksheet and submit it to the faculty advisor.

Pledge *(please sign)* _____ Date _____

*ACCT: **302, 311, 312, 320, 321, 325, 331, 340, 370, 411, 421, 422, 423, 424, 432, 433** FIN: **380, 382,**

384, 405, 410, 420, 430, 435, 445, 460, 470, 475, 480, 482, 484, 486, 488, 497 ITM: 330, 331, 332, 336, 338, 440, 442, 446, 448, 449, 497

Note: Please download this form, fill it up, and email the form to:

vpcandidates.csuebbap@gmail.com