

**Beta Alpha Psi**  
**2007-2008**  
**Policies and Procedures Manual**  
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## **INSIGNIA**

Section 1. The colors of Beta Alpha Psi shall be black and crimson.

Section 2. The official banner of Beta Alpha Psi shall consist of the insignia in black and gold on a crimson background with gold lettering.

Section 3. The certificate of membership shall be authenticated by official signatures and bear a facsimile of the seal of Beta Alpha Psi.

Section 4. The membership badge, key, or pin shall be a black and gold reproduction of the official insignia of Beta Alpha Psi.

Section 5. The Candidate pin shall conform to the design of the badge.

Section 6. All insignia shall be obtained through the Executive Office or its designated supplier.

## **ELIGIBILITY FOR MEMBERSHIP**

Section 1. Degree seeking undergraduate students and non-degree Post-Baccalaureate students at institutions where a chapter is located shall be eligible for election to membership after they:

- have declared a concentration in accounting, finance, or information systems (or have stated an intention to declare a concentration in accounting, finance, or information systems);
- have completed, in addition to two years of collegiate courses, at least one upper level course beyond the business core (for transfer students, the most recent qualifying course must be at the initiating institution or another AACSB or EQUIS accredited institution);
- have attained a cumulative grade average in upper level courses, in their declared area of concentration, beyond the business core of at least 3.0 (where A is equal to 4.0) or the equivalent; and
- have attained at least a cumulative grade average of 3.0, or
- have achieved a rank within the top 35% of their university class, or
- have attained at least a 3.25 cumulative grade average on the most recently completed 30 semester hours;
- Or have attained an honors distinction utilized by their institution deemed to be equivalent to the above by the BAP Board of Directors.

Section 2. Degree seeking graduate students (e.g., MPA, MACC, MBA, MS, PhD, etc.) at institutions where a chapter is located shall be eligible for membership if they are majoring, concentrating, or have a stated interest in accounting, finance, or information systems.

Section 3. Full-time, academically or professionally qualified members of the accounting, finance, or information systems faculty at institutions where a chapter is located are eligible for initiation as Faculty members.

Section 4. Persons exhibiting those qualities that Beta Alpha Psi fosters and who have achieved prominence in the fields of accounting, finance, or information systems or have contributed significantly of their time and talent to Beta Alpha Psi or its local chapters are eligible for election as Honorary members.

Section 5. Local chapters may establish a local chapter Candidate time period and other more restrictive requirements for membership.

### **CONTINUING STUDENT MEMBERSHIP**

Section 1. Undergraduate student members of Beta Alpha Psi shall remain student members so long as they remain degree seeking undergraduate students. Graduate students and Post-baccalaureate students at the institution where they were members as undergraduates may elect to continue or renew affiliation. Candidates shall remain Candidates until the first semester of association with Beta Alpha Psi after they have completed two years of collegiate courses and at least one upper level course in accounting, finance, or information systems (in their chosen concentration) beyond the business core. At that point they must have satisfied all the requirements for membership and be initiated or be dropped as a Candidate.

Section 2. Student members of Beta Alpha Psi who relocate at another institution, either to complete their undergraduate program or to pursue a graduate degree, may become members of the local chapter provided they: (1) apply for membership and (2) meet all membership requirements for the local chapter. Candidates who relocate to another institution to complete their undergraduate program may become Candidates of the local chapter provided they apply to the local chapter and meet the requirements of the local chapter.

### **BOARD OF DIRECTORS**

Section 1. The terms of office will be staggered as follows: The term of one Alumni member will expire every year. The term of the Directors-at-Large serving on the Board will expire at the end of their three-year tenure as Director-at-Large. The President-Elect will be elected each year and will succeed to the Presidency at the end of the first year and will succeed to the Immediate Past President at the end of the term of Presidency. The Advisory Forum Chair-elect will be elected every other year and will succeed to the Advisory Forum Chair position at the end of the one-year term as Chair-elect. The Advisory Forum Chair term will expire at the end of their two-year tenure as Chair. The term of the Dean will expire at the end of their second year unless reappointed for a third year, in which case the term of the Dean will expire at the end of his/her third year. The Director of Chapter Activities and the Director of Administration and Development will

be elected at the expiration of the predecessor's term. The AICPA Liaison will be replaced when deemed appropriate by the AICPA.

Section 2. When the term of a Board member is due to expire, the nominations committee shall submit to the Board one name for each of the following positions: President-Elect, Advisory Forum Chair-Elect, Business School Dean, Director of Administration and Development, Director of Chapter Activities and Alumni Representative. The nominations committee shall submit two names for the positions of Directors-at-Large who are at the completion of their three-year term. The Board will select the Advisory Forum Chair-Elect, Dean and Alumni Representatives to serve on the Board. Candidates for other positions will be elected by Board members and Chapter Faculty Advisors through a ballot distributed within 10 days after the last Regional Meeting. **Only** Faculty Advisors in the Region(s) being contested shall be eligible to vote for Directors-at-Large. The candidate[s] who receive(s) the most votes by mail, fax or via the internet shall be elected. Only votes received in the Executive Office by the date noted on the ballot shall be counted. Any disputes in election results shall be settled by a majority of the Board. Alumni members of the Board shall present their top three choices for the successor for the outgoing alumni representative to the Board, who will select one of these three for the position. At the beginning of their third-year of service on the Board, the Directors-at-Large will select one Director-at-Large to serve as Director of Regional Meetings and one Director-at-Large to serve as Director of Activities for Directors-at-Large. The AICPA Liaison will be selected by the AICPA subject to approval by the Nominations Committee and the Board.

Section 3. The nominations committee consists of the following individuals: the immediate Past President, Advisory Forum Chair, the President, the President-Elect, the Business School Dean, and the Director of Activities for Directors-at-Large. The immediate Past President serves as chair of the nominations committee. The nominations committee shall ascertain the extent to which potential nominees meet the eligibility requirement of the Bylaws. A member of the nominating committee informs each nominee of the responsibilities of that position in order to determine his/her willingness to serve.

**The President's Duties are to:**

- Plan and direct the annual meeting and the International Chapter Meeting that takes place during the annual meeting. Work with the Executive Director to handle arrangements
- Preside at meetings of the Board and the International Chapter
- Appoint committee members
- Ensure adequate administrative support (i.e. AICPA alliance) at the Executive Office level
- Submit proposals for action by the Board
- Ensure the integrity of the Annual Report
- Promote the efficiency and effectiveness of Beta Alpha Psi
- Submit to the Board a Statement of Objectives

- Notify all award winners
- Develop a meeting agenda with the Executive Director and preside over meetings of the Board
- Oversee the installation of new chapters
- Work with the Director of Administration and Development to ensure financial integrity and stability
- Communicate with chapters through newsletter (web) articles

**The President-Elect's Duties are to:**

- Submit proposals for courses of action to the Board for his/her year of Presidency
- Advise and assist the President in performing presidential duties
- Assume duties in the absence or incapacity of the President
- Fulfill other assignments given by the President

**The Directors-at-Large' Duties are to oversee their respective regional meetings, including to:**

- Offer general assistance to the host chapter in pre-planning the Regional Meeting
- Approve the host chapter budget (\$500 incidental advance from the Executive Office) and final program
- Accept the Best Practices abstracts and follow the process outlined in the Best Practices Manual
- Require adherence to Regional Meeting guidelines regarding the planning, organization, and reporting of the Regional Meeting by the host chapter
- Assist the host chapter of a regional meeting in the event the host chapter's faculty advisor is unavailable due to extenuating circumstances
- Confirm within assigned region a hosting commitment for the next two regional meetings, prior to the close of the current Regional Meeting
- Review the interim and final regional meeting report, prior to review by the Director of Regional Meetings and submit to the Executive Office within two weeks after the regional meeting concludes
- Develop recommendations for improving the regional meeting process and structure to be submitted to the Director of Regional Meetings
- Review all reports and conduct a debriefing via conference call with the existing host chapter and the successor host chapter.

The Directors-at-Large also assist chapters in their respective regions with chapter operations duties, including to:

- Monitor local chapter activities and performance in compliance with Program of Chapter Activities
- Participate in the appeals process for chapter awards
- Nurture faculty advisors

- Strengthen the lines of communication between the local chapters and the Board
- Work with chapters to ensure that fees are paid to the Executive Office, that chapters adhere to the Program of Chapter Activities, that chapters successfully accomplish their goals and that chapters avoid probation
- Work with petitioning chapters, including;
- Monitor program of petitioning chapters
- Review new chapter petitions for adequacy and report to Board as petitions arrive. Contact chapters for revision, if appropriate.
- Provide suggestions for process improvements
- Report at each Board meeting on petitioning chapters
- Send letters to each petitioning chapter shortly after Board meeting regarding the decision of the Board—site visit, deferral of site visit, readiness for initiation, postponement of initiation.
- Assist probation chapters
- Recommend those Faculty Advisors to be designated as Outstanding Faculty Advisors and so honored at the Annual Meeting in August
- Encourage chapters to solicit new associates
- Encourage chapters to solicit new petitioning chapters
- Serve on committees as assigned by the President (or volunteer)
- Meet as separate group at each Board meeting, as well as meeting with Board
- Fulfill other assignments given by the President, the Director of Regional Meetings and the Director of Activities for Directors-at-Large.
- Fulfill other duties as defined in the current Directors-at-Large Manual.

**The Duties of the Director of Chapter Activities are to:**

- Design the Program for Chapter Activities, to be approved by the Board, and recommend changes in the PCA, presented in draft form, at the January Board meeting and finalized at the Board meeting held in conjunction with the annual meeting
- Administer the PCA and PCA reporting
- Recommend chapter and advisor awards to the Board
- Recommend to the Board the chapters to be placed on probation and the chapters to be removed from probation
- Notify chapters when they are placed on probation and removed from probation
- With the help of the Executive Director, ensure that an updated membership list is being maintained as part of the international database
- Work with the Advisory Forum and Directors-at-Large to monitor, activate, and develop chapters
- Fulfill other assignments given by the President

**The Duties of the Director of Administration and Development are to:**

- Oversee maintenance and safe keeping of all records, correspondence, and properties not otherwise assigned. This includes the operating cash budget, and policy manuals, and assist in final arrangements for an annual audit by a CPA approved by the Board.
- With the assistance of the Executive Office and President, assume responsibility for the final content of publications of Beta Alpha Psi
- Keep the Constitution and Bylaws updated for approved changes
- Develop and present an annual cash budget for approval at the January meeting of the Board
- Approve all disbursements over \$5,000 except those involving his/her own travel
- Research, develop, and assist in the implementation of new member programs after discussion and approval by the Board.
- Fulfill other assignments given by the President

**The Duties of the Advisory Forum Chair are to:**

- Be responsible for selection of the recipients of the Business Information Professional of the Year Awards (Select 5 or 6 candidates in each category for the screening committee)
- With the President, send letters to the Business Information Professional of the Year recipients
- Coordinate the attendance of Forum members at Regional Meetings and at the installation of new chapters of Beta Alpha Psi
- Plan the agenda and preside at meetings of the Advisory Forum
- Communicate to the Board the recommendations of the Advisory Forum
- Keep the Forum informed of actions and activities of the Board
- Spearhead fund raising through the Associates Program
- Nominate prospective Associates to the Board and, after their approval, contact new Associates
- Fulfill any other assignments given by the President

**The Duties of the Advisory Forum Chair-elect are to:**

- Assist the Advisory Forum Chair in the administration of his/her duties
- Preside at meetings of the Advisory Forum if the Chair is absent
- Fulfill any other assignments given by the President

**The Duties of the Alumni Representatives are to:**

- Consult and make recommendations to the Board for improving the efficiency and effectiveness of Beta Alpha Psi
- Serve as resource persons to the Board representing the current views of students

- Present to the Board the top three choices of applicants for the new alumni member each year
- Attend Regional meetings when requested
- Fulfill other assignments given by the President

**The Duties of the Business School Dean are to:**

- Advise and make recommendations to the Board for improving the efficiency and effectiveness of Beta Alpha Psi
- Serve as a resource to the Board representing the current views of academia
- Work with Deans and Faculty to encourage the establishment of new Beta Alpha Psi chapters
- Conduct special projects as requested by the President

**The Duties of the AICPA Liaison are to:**

- Coordinate activities with the AICPA
- Supervise the Executive Office staff

**The Duties of the Immediate Past President are to:**

- Serve as Chairman of the Nominations and Finance committees
- Conduct the elections
- Notify nominees of the outcome of the election
- Fulfill other assignments given by the President

**Committee Duties**

Duties of the Finance, Investment and Audit Committee shall include, but are not limited to:

- Reviewing important background material.
- Evaluating additional or alternative ways to finance existing Beta Alpha Psi activities.
- Planning financial strategies for Beta Alpha Psi's initiatives and activities.
- Reviewing the annual cash budget prepared by the Director of Administration and Development prior to its presentation to the full Board.
- Monitoring the investment of Beta Alpha Psi funds in accordance with established Board policies and procedures.
- Reviewing, as needed, Beta Alpha Psi costs (such as employee benefits and web site development and maintenance) and recommend changes as appropriate.
- Reviewing all proposals submitted to the Board that could have a significant financial impact on Beta Alpha Psi.
- Acting as the Board's and International Chapter's Finance, Investment, and Audit Committee

- Undertaking special initiatives concerning the financial goals and strategies of Beta Alpha Psi as directed by the President or Board.

## **ADVISORY FORUM**

### **All Members of the Advisory Forum shall:**

- Attend Regional Meetings when requested or when possible
- Speak, as requested, at chapter, regional, national and international Beta Alpha Psi activities
- Provide monetary support to Beta Alpha Psi
- Attend one advisory forum meeting each year, held in conjunction with the annual meeting of Beta Alpha Psi
- Serve on committees, as assigned by President or Board
- Submit Business Information Professional of the Year nominations to the Board
- In coordination with Chapters and the Executive Office, recruit and contact firms and companies to become new international and regional associates

## **DUTIES OF CHAPTER OFFICERS**

Section 1. The President presides at meetings of the chapter and of the executive committee; appoints such committees as the constitution or bylaws, or vote of the chapter shall provide; determines that all reporting responsibilities and other duties of the vice president, secretary, and treasurer are performed in accordance with the Constitution and Bylaws; and seeks to promote the welfare of the chapter and Beta Alpha Psi.

Section 2. The vice president assists the President in the performance of prescribed duties and acts in the President's place in the event of absence or incapacity. In the event the office of the President is vacant, the vice-president shall assume the duties and responsibilities of the President.

Section 3. The faculty advisor serves as the advisor to the chapter and when requested to do so by the Board attests to the chapter's compliance with specified provisions of the Constitution, Bylaws, and Program for Chapter Activities.

Section 4. The secretary records the minutes of the meetings of the chapter and the executive committee; ensures that the chapter on-line update is completed at least annually and that the membership roster is updated as necessary; ensures that the remittance of Candidate fees; initiation fees and chapter dues are paid in accordance with the Program of Chapter Activities; transmits to the Executive Office a list of chapter officers within fourteen days of their installation; prepares and transmits such other reports as required by the Board and the Program for Chapter Activities; and fulfills all other duties ordinarily associated with the office of the secretary.

Section 5. The treasurer collects money owed to the chapter, disburses for authorized purposes, maintains appropriate financial records, arranges for the audit, if one is

required by the Executive Office or if one is desired by the local chapter, and prepares the local Chapter's tax return.

## **RESIGNATION OF MEMBERS**

Section 1. A member or Candidate may resign from Beta Alpha Psi by notifying in writing the Faculty Advisors and local chapter president.

Section 2. The resigning member shall surrender the membership certificate and other Beta Alpha Psi insignia to the local chapter. The local chapter must forward the membership certificate to the Executive Office. Initiation fees and Candidate fees are nonrefundable.

## **EXPULSION OF MEMBERS**

Section 1. A member may be expelled for conduct detrimental to the purposes or interests of Beta Alpha Psi. Charges of such conduct must be made in writing to the faculty advisor and signed by a member of Beta Alpha Psi.

Section 2. When such charges have been made against a member, the faculty advisor must make certain that the accused member is given notice and an opportunity to be heard concerning the charges. Notice must be given to the accused member by certified mail at least thirty days before the hearing, and such notice shall include: (1) a copy of the charges made against the member; (2) the time, date, and place of the hearing; (3) an explanation of the expulsion procedures which include automatic review by the Board.

Section 3. A committee of chapter members, including at least two faculty members (exclusive of the faculty advisor) of Beta Alpha Psi, is to be selected by the Faculty Advisor and ranking chapter officer to investigate the charges and make a determination as to whether or not the accused member should be expelled. The findings should be based on a presentation of the charges by the accusing member and the accused member has the opportunity to appear and explain the actions in question.

Section 4. If expelled, the member may request a hearing before the entire local chapter in a special meeting called for that specific purpose. A majority vote of the chapter may reverse the committee's findings.

Section 5. If the local chapter's decision is to expel the member, details of the procedures followed, the evidence submitted, and the action taken shall be forwarded immediately to the Executive Office.

Section 6. The local chapter's decision will be reviewed at the next regular meeting of the Board. Both the local chapter and the accused member shall be notified in writing by the Director of Administration and Development of the approval or disapproval of the expulsion.

Section 7. If expelled by the local chapter, the member must surrender the membership certificate and other Beta Alpha Psi insignia to the local chapter. The local chapter shall forward the membership certificate to the Executive Office.

Section 8. Student members of Beta Alpha Psi who relocate at another institution, either to complete their undergraduate program or to pursue a graduate degree, may become members of the local chapter provided they: (1) apply for membership and (2) meet all membership requirements for the local chapter. Candidates who relocate to another institution to complete their undergraduate program may become Candidates of the local chapter provided they apply to the local chapter and meet the requirements of the local chapter.

Candidates may be terminated for reasons enumerated in Section 1. If a Candidate is terminated, the local chapter shall notify the Executive Office within fourteen days of the termination.

### **PROBATION, SUSPENSION AND REVOCATION OF CHARTER**

Section 1. A chapter at an institution that ceases to be an accredited member of the AACSB or EFMD/EQUIS is automatically suspended

Section 2. A chapter under probation has up to two years to correct the deficiency and restore itself to good standing. The Board shall actively assist the chapter to correct the deficiency.

Section 3. If a chapter fails to satisfactorily correct the deficiency, the Board shall suspend the chapter's operations.

Section 4. A chapter may petition the Board to be placed on suspension.

Section 5. A chapter under suspension may not initiate members or operate in any way as a Beta Alpha Psi chapter. A chapter, other than a chapter at an institution that was suspended because the institution ceased to be an accredited member of the AACSB or EFMD/EQUIS shall not remain in this status for more than three years. In order for a chapter to be reactivated, it presents a petition to the Board. The petition should clearly indicate the reasons that the chapter should be removed from suspension and should include a plan to correct the problems that led to the suspension.

Section 6. When a chapter is reactivated after a period of suspension, the chapter shall be placed in a probationary status as described in Section 2. If at the end of two years the chapter does not go off probation, the charter shall be revoked.

Section 7. If the chapter, except for chapters at an institution that was suspended because the institution ceased to be accredited member of the AACSB or EFMD/EQUIS, has not been reactivated within the three-year period following the date of its suspension, its charter shall be revoked. For chapters at an institution that was suspended because the

institution ceased to be accredited member of the AACSB or EFMD/EQUIS, the charter shall be revoked when it becomes apparent that the institution will not be able to regain accreditation but no later than seven years from the date the charter was suspended for loss of accreditation.

Section 8. When a charter is revoked, the chapter must send the charter and chapter banner to the Director of Administration and Development. The charter and banner must not be reactivated.

Section 9. When a charter has been revoked, the school may petition for a new Beta Alpha Psi chapter.

Section 10. Except in situations where the institution has ceased to be fully accredited, at least two-thirds of the Board must vote affirmatively for probation, suspension, or revocation of a chapter's charter. In situations when the institution has ceased to be fully accredited, actions taken for probation or suspension are automatic at the times specified in sections 1, 2, 5, and 6.

Section 11. Except in situations where the institution has ceased to be fully accredited, at least two-thirds of the Board present and eligible to vote must vote affirmatively for probation, suspension, or revocation of a chapter's charter. In situations when the institution has ceased to be fully accredited, actions taken for suspension are automatic at the times specified in sections 1 and 7.

Section 12. At the discretion of the Board, a Chapter may be suspended or the Chapter's charter revoked for "acts discreditable" as deemed by the Board.

## **AMENDMENTS – VOTING PROCEDURES**

Voting procedures for amendments to be voted on during one of the two scheduled annual Board meetings:

All members of the Board must receive by mail, fax, or email a notification of proposed revisions to the Constitution and Bylaws;

the above notification must:

- be distributed at least 21 days prior to the meeting,
- include a listing of all section or sections to be discussed (added, deleted, or revised), and
- include the text of the proposed changes and identify the sponsor (and justification) of each proposal;
- the meeting must be attended by the majority of the Board members;
- all revisions to the Constitution must be approved by a two-thirds vote to of the Board members eligible to vote (not a two-thirds vote of the quorum in attendance); and

- all revisions to the Bylaws must be approved by a majority of the Board members eligible to vote (not the majority vote of the quorum in attendance;) and
- in the event that a Board member is absent from the scheduled meeting, no proxy may be given.
- Voting procedures for amendments to be considered and voted on by the Board via mail, fax, or email:
- all members of the Board must be notified of proposed revisions to the Constitution and Bylaws at one of the three scheduled annual Board meetings;
- Prior to a vote of the Board, the proposed revision must, in addition to being discussed at an earlier Board meeting:
  - be distributed in writing at least 21 days prior to the first date voting is accepted (use postmark date if distributed by mail);
  - note the period in which voting will be allowed (the first date voting will be accepted and the cut-off date);
  - indicate that votes must be submitted to the Executive Office of Beta Alpha Psi;
  - indicate that the Executive Director will be responsible for tallying the votes;
  - indicate that each Board members should communicate their vote to all other members of the Board;
- include a listing of each section or sections to be discussed (added, deleted, or revised); and
- include the text of the proposed changes and identify the sponsor (and justification) of each proposal;
- all revisions to the Constitution must be approved by a two-thirds vote of the Board members eligible to vote;
- all revisions to the Bylaws must be approved by a majority of the Board members eligible to vote.

## **ALCOHOL POLICY**

Beta Alpha Psi prohibits the consumption of alcohol products at any meetings, functions, or events that are either 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, annual meetings, 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 Board of Directors.

## STATEMENT OF DISABILITIES ACT

### Statement of the Beta Alpha Psi Board of Directors, January 1997

"It is the intention of Beta Alpha Psi to comply fully with the Americans with Disabilities Act (ADA). Any Beta Alpha Psi members, candidates, faculty advisors, Council or Forum members, or others planning to attend a Beta Alpha Psi meeting, program or activity who have special needs as covered by the ADA, are requested to notify the sponsoring Beta Alpha Psi chapter or the Beta Alpha Psi Executive Office prior to the registration deadline so as to facilitate identification by Beta Alpha Psi of these special needs."

### Policy dissemination

The following statement will be included in all announcements of Beta Alpha Psi regional and annual meetings, as well as in announcements for other Beta Alpha Psi activities and programs:

"It is the intention of Beta Alpha Psi to comply fully with the Americans with Disabilities Act (ADA). Any Beta Alpha Psi members, pledges, faculty advisors, Council or Forum members, or others planning to attend this meeting who have special needs as covered by the ADA, are requested to notify the [...insert name of sponsoring organization...] prior to the registration deadline so as to facilitate identification by Beta Alpha Psi of these needs."

In addition to the above, each registration form should include an opportunity for participants to indicate if they are vegetarian, or have other special dietary requirements.

If a host chapter is contacted by someone with special needs the host chapter should immediately contact the Beta Alpha Psi Executive Office to obtain assistance in responding to these special needs.

## PROFESSIONAL NATURE POLICY

While participating in the activities of Beta Alpha Psi, all members are expected to conduct themselves in a manner that is appropriate for financial information professionals.

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.** Beta Alpha Psi specifically condemns the use of crude or sexually explicit language. Beta Alpha Psi also condemns the use of racial, religious, ethnic, or gender categories for purposes that are offensive because of their derogatory nature.

## **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 asked 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.