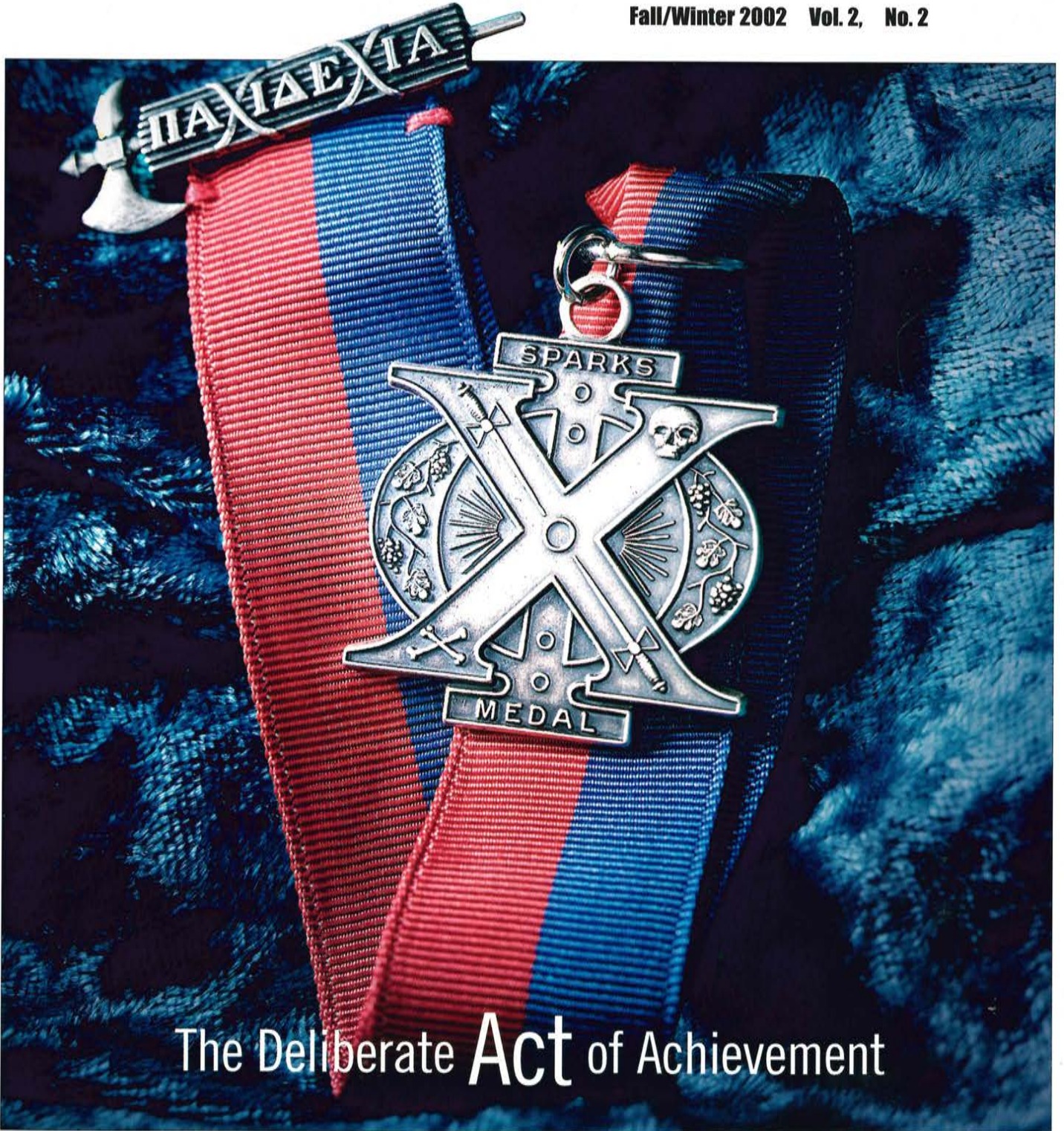


A Publication for Contributors

# true blue



Fall/Winter 2002 Vol. 2, No. 2



The Deliberate **Act** of Achievement

# Dear Brothers and Friends,

Every truly great masterpiece begins with one person making the intentional choice to create it. Despite our different talents and passions, we all have the ability to achieve something great in our lifetime. However, we can only do so by a conscious decision to invest the necessary time and resources.

## The Deliberate Act of Achievement

This issue of *True Blue* is dedicated to those individuals who have performed deliberate acts of achievement. It is inspirational to read about the amazing young men who are this year's Chi Phi Scholars and the 2001-02 Sparks Memorial Medal recipients.

Through their various accomplishments, these young men embody the ideals of Chi Phi. Unquestionably, they are committed to succeed and have made great sacrifices to achieve their goals.



They stand as great examples for us all.

At the same time, we are equally inspired by those alumni who made these fine programs possible through their deliberate choice to invest their own time and resources. It is clear that—without their foresight and support—we would not have the honor and privilege of passing this fine Brotherhood onto the next generation.

Thank you for what you have done and continue to do for Chi Phi. We hope you enjoy this issue and wish you the best during the upcoming holiday season!

Fraternally,

Scott W. Henderson  
Executive Director  
Chi Phi Educational Trust

Adam Langley  
National Director  
Chi Phi Fraternity

Cover: The Sparks Medal: Chi Phi's ultimate award for academic excellence

A Publication for Contributors Est. 2001  
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The mission of True Blue is to illustrate the impact of philanthropy, provide direct access to Chi Phi's leaders, and feature special in-depth stories of interest to stakeholders of Chi Phi.

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**Chi Phi Fraternity  
 & Chi Phi Educational Trust**

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North-American Interfraternity Conference



College Fraternity Editors Association

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# ITY-“PHI”VE

## Chi Phi Scholars for 2002-03

For the 2002-03 academic year, the Chi Phi Fraternity and the Chi Phi Educational Trust proudly recognize the achievements of twenty-five Chi Phi students by investing in their future with merit-based financial awards ranging from \$500 to \$2,500. While each student is unique, they collectively represent the ideals of the well-rounded life: leadership in their Chi Phi chapter and on campus; regular participation in philanthropic projects, such as Habitat for Humanity, St. Jude's Children's Hospital, and the Ronald McDonald House; and commitment to their community through such volunteer work as Boy Scouts and local mentoring and tutor programs.

"In the past two years, we have seen a tremendous amount of bright, impressive men step forward for the Chi Phi Scholarship Program," notes Scott Henderson, executive director of the Trust. "The Trust is pleased to be a part of this effort through a grant to the Fraternity and is fully committed to increasing alumni support for scholarships, either through the general scholarship fund or working with individuals to create new endowed scholarship funds. There is no doubt that the need for scholarship dollars exceeds our funding ability. Let's hope more alumni are willing to join the generous alumni who have already found great personal satisfaction in helping young men of great promise realize their dreams."

**Terry Alden Gaige, Beta 2004**, is a mechanical engineering major with a grade point average of 4.7 out of a possible 5.0 at one of America's most rigorous and competitive engineering schools, the Massachusetts Institute of Technology. Praising Terry's work in MIT's robot design contest, Senior Lecturer Ronald Campbell writes: "Terry received an 'A' in this course, and...was able to relate the theoretical with the practical...Terry came up with a clever design: his vehicle was bi-modal and could be driven upside down, so that he had a unique defensive strategy!" Terry later applied this experience to his summer internship at Lockheed Martin on a space vehicle project to pull satellites in corrected orbits.



**Left to Right:**

**Terry Alden Gaige  
Beta 2004**

**Chad Everett Johns  
Alpha-Chi 2002**

**Louis George Graff V  
Gamma 2004**

Paralleling the times, the majority of scholarship recipients, undergraduates and graduates alike, are pursuing careers in business, aerospace, medicine, and computer science. The remainder are concentrating in the liberal arts—English, communication, creative writing, philosophy, theology, architecture, and the classics—or, in a few instances, combining science and the arts in a double major. What they all have in common are the devotion and admiration of their peers and the respect and affection of their professors. While there is not space to list the vitae of all recipients, the following quartet of winners represents the extraordinary width and depth of Chi Phi's pool of outstanding young men.

A true "Renaissance man" with his combined passion for science and the arts, Terry is an avid cellist with the MIT Symphony Orchestra and toured Europe as the 4th chair cellist last summer. As a member of the orchestra and Chamber Music Society, he is required to practice many hours a week, which often entails night rehearsals beginning as late as 10:00 or 11:00 p.m. "Despite these large time commitments and the time put into keeping up his strong academic record, he is still able to put his dedication to our fraternity at the top of the list," remarks Chapter Alpha David Michael Smith,

In the chapter house, Terry has served as Beta's Gamma and Athletic Chair and is the current Epsilon. He also serves on the New Member Education Committee in this important transitional year when MIT is requiring freshman to

live on campus. As the Community Service Chair, Terry organized the annual Road Race fundraiser with a record number of runners, for which he received his third "Gavel," a coveted award among the Beta Brothers. Brother Smith points out that "more important than his success in various house offices is the way Terry readily volunteers to help others and the house. He'll start cleaning up the house right after a party, switch dish slots, wait tables, or attend a meeting if you can't make it ..." In his pursuit of excellence, Terry Gaige understands that true leadership—in small and large ways—is by example.

academic advisor, Dr. Robert O. Harmon, "From his performance in the class he took from me and the conversations I have had with him when we discussed his assignments in physics classes, it is clear to me that Chad has a well-developed intuition for how the physical universe works along with strong quantitative reasoning and critical thinking abilities. Like theologians, astronomers are of course interested in questions of origins and of humanity's place in the universe. I suspect that Chad's scientific training and astronomical knowledge will serve him well as he approaches these questions from a theological perspective."



**Chad Everett Johns, Alpha-Chi 2002**, graduated Phi Beta Kappa from Ohio Wesleyan University with a 3.94 grade point average out of possible 4.0 as a psychology major with a double minor in astronomy and physics. He is currently enrolled at Boston University's School of Theology where he is pursuing a master of divinity degree with a goal "to earn [my] Ph.D. in a theological area and seek ordination in the United Methodist Church." Brother Johns adds, "Graduate school will help equip me with other tools needed to serve God and His people faithfully."

Originally declaring a double major in astrophysics and psychology, Chad adjusted his major in his senior year after finding his life's calling. However, the study of theology and astrophysics are not—as it would seem—worlds apart, but quite compatible. Writes his

Joining Chi Phi his senior year at Ohio Wesleyan, Chad quickly became assimilated into chapter activities, helping with landscaping and renovation of rooms. Although Chad didn't "go Greek" until late in his college year, Chapter Alpha Kevin Kula [another 2002-03 Chi Phi Scholar] explains, "I know that Chad became a Chi Phi at exactly the right time in his life...I am proud to be Chad's Big Brother. However, it is peculiar for me to fill that role for someone to whom I look up to with great admiration. And, knowing Chad as I do, he will dedicate himself to his vocation by helping others find the tranquility that has kept him smiling since the day we met."

Left to Right:

Edgar Ivan Hernandez  
Lambda Zeta 2002

Kevin Gerard Kula  
Alpha-Chi 2004

Joseph Francis Rakow  
Sigma Delta 1999

Chad had a reputation for helping others well before he joined Chi Phi, particularly with trips on the university's Spring Break Mission Week. He traveled to Nicaragua to help with hurricane relief, co-led a team to Belfast, Northern Ireland, to explore the Catholic-Protestant conflict, and co-led a team to Santa Cruz, Boliva, to work at the Talita Cumi orphanage. He distills these collective experiences into a few powerful words: "One cannot truly appreciate the benefits and detriments of a particular cultural worldview until one has stepped outside of it and into another." An apt observation from someone whose studies in astrophysics give him a cosmic perspective.

From the beginning, Louis brought the same enthusiasm to his membership in the Gamma Chapter by recruiting his friends to build a strong new member class. Now the current Alpha, Louis has consistently held leadership roles in Gamma's endeavors, including attendance at the Fraternity's College of Excellence and heading Emory's award-winning "Canned Food Drive and Holiday Dinner," which is a collaborative effort of the Greek community on campus. His other philanthropic activities include volunteer work as counselor at the Connecticut Hole in the Wall for children with life-threatening illnesses and volunteer in the emergency department of the New Britain General Hospital near his hometown of Unionville, Connecticut.



Left to Right:

**Eric Anthony Navarette**  
Lambda Zeta 2003

**Christopher Shawn Kinsey**  
Delta Pi 2000

**Richard Albert Olague**  
Lambda Zeta 2003

**Louis George Graff V, Gamma 2004**, attends Emory University in Atlanta, Georgia, where he is a Phi Beta Kappa, a Goodrich C. White Merit Scholar, a member of various honors societies, including the National Society of Collegiate Scholars, and named to the Dean's List for the past four consecutive terms. In addition to his impressive academic achievements, Louis embellishes his life with eclectic extra-curricular interests ranging from poetry to lacrosse. Past Chapter Alpha (2001-2002) Tyler C. Sadak notes that "Louis remains extremely involved in everything he does, whether it is tutoring biology students or participating in the Outdoor Emory Organization."

In recommending Louis Graff for the Chi Phi Scholarship Program, Brother Sadak writes: "Louis's academic performance speaks for itself. Pursuing a double major in neuroscience/behavioral biology and creative writing, while fulfilling the pre-med requirements is one of the most challenging curricula that could be chosen at any university, let alone Emory. While pursuing these aspirations, Louis has maintained a 3.95 out of a 4.0 grade point average, an impressive feat in and of itself."

Asked about his unusual double major, Louis answers, "I didn't want to give up my passion for science or writing. Both my parents are physicians, and they encouraged me to keep up my writing, which is an especially valuable skill in the field of medicine. One of my idols is John Stone,



who is a southern poet and physician. He and writers like William Carlos Williams use both sides of their minds. The big thing for me right now is keeping my options open. An intriguing idea is tropical medicine. In addition to science and writing, I have a passion for travel. In tropical medicine, I could combine all three and also find myself in some pretty interesting and strange places!"

**Edgar Ivan Hernandez, Lambda Zeta 2002**, graduated *cum laude* from St. Mary's University in San Antonio, Texas, with a 3.7 grade point average out of a possible 4.0 with a bachelor of science degree in biology and a minor in chemistry. "This is a stellar accomplishment for a dedicated Brother," writes Eric Navarette, Chapter Alpha and

During undergraduate years at St. Mary's, Edgar was president of the Tri Beta Biological Honor Society as well as the vice president of the National Order of Omega Honor Society and member of the founding class of the National Greek Academic Honor Society. A St. Mary's "Distinguished Leader" in 1999-2002, he was named to the Dean's List "Highest Honors" in 1999-2002 and listed among "Who's Who Among Students in American Universities and Colleges" for 2001-2002.

Graduating as Lambda Zeta's "senior of the year," Edgar had served his chapter well as Beta, Social Chair, New Member Education Program, Honor Court Judge, and as a member of the Chi Phi Regional Alliance Committee. Brother



a 2002-03 Chi Phi Scholar.

In recommending Edgar for the Chi Phi Scholarship Program, Dr. Lucien C. Manchester, professor of biology, notes: "Edgar has the determination and strong work ethic to achieve his life-long goal, which is to be a competent scientist and physician. It is candidates like Edgar that will maintain the excellent record of the St. Mary's University students in the medical arena." With a goal to become a neurological surgeon, Brother Hernandez enrolled this fall in the University of Texas Health Science Center at the Houston School of Medicine. He plans to practice medicine in his hometown of Brownsville, Texas, as a "way of giving back to the community which has done so much for me."

Hernandez also participated in the Student Government Association, Campus Ministry, the Rattler school newspaper, student orientation, and Habitat for Humanity. His lengthy list of philanthropic endeavors includes the San Antonio AIDS Walk, Asthma Walk, Ronald McDonald's House, Habitat for Humanity, and March of Dimes. As Dr. Manchester points out, "Edgar has volunteered hundreds of hours to help the less fortunate in our community." It's an exemplary trait that this altruistic young medical student will surely bring to his hometown, when he returns in a few years as "Dr. Edgar Hernandez."

**Left to Right:**

**Michael Anthony Kolenc  
Lambda Zeta 2003**

**James Joshua Curtain  
Delta Pi 2001**

**Ernie De La Rosa  
Lambda Zeta 2004**

# MEET THE CHI PHI SCHOLARS FOR 2002-03



Left to Right:

**Philip Janmin Lee**  
Beta 2003

**Jeffery Garrett Mellott**  
Psi Zeta 2001

**Josh William Seymore**  
Beta Theta 2003

**Kevin Gerard Kula, Alpha-Chi 2004 . . . . . \$2,500**

Ohio Wesleyan University  
Major accomplishments: Psychology major with 3.88 GPA; Presidential Scholar; IFC-Panhellenic Council-Office of Greek Affairs' Academic Excellence Award; Chapter Alpha; IFC Presidential Roundtable; chairperson, Campus Honors Program Board

**Joseph Francis Rakow, Sigma Delta 1999 . . . . \$2,000**

University of California, Davis  
Master of Science in aerospace engineering from University of Michigan with 3.87 GPA  
Pursuing Doctor of Philosophy degree at the University of Michigan

Major accomplishments: Rollin M. Gerstacker Graduate Research Fellowship; 1999 UC Davis "Greek Man of the Year"; graduated with departmental honors; Dean's List; Sparks Memorial Award; Chapter Alpha and Eta; NASA RISE Minority Mentorship Program

**Edgar Ivan Hernandez, Lambda Zeta 2002 . . . . \$1,500**

St. Mary's University  
First-year medical student at University of Texas, Houston  
Major accomplishments: Graduated cum laude with a 3.7 GPA; Lambda Zeta "Graduating Senior of the Year"; president, Beta Beta Beta Biological Honor Society; vice president, National Order of Omega Honor Society; Chapter Beta

**Eric Anthony Navarette, Lambda Zeta 2003 . . . \$1,500**

St. Mary's University

Major accomplishments: "Greek Man of the Year"; Alumni Association Scholar; Dean's List; Outstanding Academic Performance Criminal Justice 4 semesters; Order of the Omega; Greek National Honor Society; President's Ambassador; Chapter Alpha and Delta; Chapter "Brother of the Year"

**Louis George Graff V, Gamma 2004 . . . . . \$1,250**

Emory University

Major accomplishments: Majoring in neuroscience/behavioral biology and creative writing with a 3.946 GPA; current Chapter Alpha; Phi Beta Kappa; National Society of Collegiate Scholars; Dean's List 4 semesters

**James Michael Courage, Alpha-Tau 2002 . . . \$1,000**

University of Michigan; Post-Baccalaureate studies, University of Pennsylvania

Major accomplishments: Classical Archaeology Prize for Outstanding Graduating Senior; Grand Iota 1999-2000; National Society of Collegiate Scholars

**James Joshua Curtin, Delta Pi 2001 . . . . . \$1,000**

Georgia Southwestern State University;

Graduate student at GSSU in Management

Major accomplishments: Current Chapter Alpha; Chi Phi Gladfelter Award Winner; GSSU "Greek Man of the Year"



**Christopher Shaun Kinsey, Delta Pi 2000 . . . \$1,250**

Georgia Southwestern State University

Pursuing Masters in Administration at GSSU

Major accomplishments: Dean's List 7 semesters; President's List 2 semesters; Gamma Beta Phi Honor Society; Chapter Beta; Boy Scouts of America adult leader

**Richard Albert Olague, Lambda Zeta 2003 . . . \$1,250**

St. Mary's University

Major accomplishments: English/communication arts major with 3.94 GPA; Greek Honor Society; Sigma Tau Delta; National Scholars Honor Society; Who's Who Among Students in American Universities and Colleges; Dean's List; Student Life Award for Academic Achievement; Chapter Zeta

**Ernie De La Rosa, Lambda Zeta 2004 . . . . . \$1,000**

St. Mary's University

Major accomplishments: Dean's List "Highest Honors" 2 semesters; "Outstanding Academic Achievement Award for a Social Greek" 2 semesters; Gates Millennium Scholar; School of Business Administration; Academic Excellence Award

**Chad Everett Johns, Alpha Chi 2002 . . . . . \$1,000**

Ohio Wesleyan University

Pursuing Master of Divinity at Boston University

Major accomplishments: Psychology major with double minor in astronomy and physics, 3.94 GPA; Dean's List 8 semesters; Phi Beta Kappa; Omicron Delta Kappa; Psi Chi; Sigma Pi Sigma; president, Christian Student Leadership Council

Left to Right:

Gérard Y. Le Canu  
Lambda Zeta 2003

Mark Joseph Zmarzly  
Alpha Theta Chi 1998

Matthew Alexander Antush  
Mu Zeta 2005

**Michael Anthony Kolenc, Lambda Zeta 2003 . . . \$1,000**

St. Mary's University

Major accomplishments: Criminal justice/pre-law major with 3.5 GPA; political science departmental scholarship recipient; Dean's List 2 semesters; Presidential Scholarship recipient; president, Student Government Association; Chapter Honor Court Justice

**Philip Janmin Lee, Beta 2003 . . . \$1,000**

Massachusetts Institute of Technology

Major accomplishments: Chemical engineering/biology major with a 5.0 GPA; Sonya Miles Award; Paul E. Gray Undergraduate Researcher; Tau Beta Pi Honor Society; Chapter Alpha, Beta, and Delta

**Terry Alden Gaige, Beta 2004 . . . \$750**

Massachusetts Institute of Technology

Major accomplishments: Mechanical engineering major with a 4.7 GPA; Chapter Gamma and Epsilon; MIT Symphony Orchestra; offered an Undergraduate Research Opportunity

**Gérard Y. Le Canu, Lambda Zeta 2003 . . . \$750**

St. Mary's University

Major accomplishments: Dean's List 2 semesters; President's Scholarship; SGA representative and Senator; Lambda Zeta "New Member of the Year"; Chapter Delta, Epsilon, and Zeta



Left to Right:

**Joseph Michael Hickson, III  
Rho 2002**

**Dominique Minjarez  
Lambda Zeta 2004**

**David Michael Musgrave  
Mu 2003**

**Jeffrey Garrett Mellott, Psi Zeta 2001 . . . \$1,000**

University of Texas, Dallas

Pursuing Ph.D. at UTD in applied cognition and neuroscience

Major accomplishments: Order of Omega; Chapter Alpha and Delta

**Josh William Seymore, Beta Theta 2003 . . . \$1,000**

Chowan College

Major accomplishments: Graphic communications major with 3.49 GPA; President's List; Dean's List; "Who's Who Among American College Students"; PICA Scholarship; NSTF Scholarship; SGA Senior class senator; Chowan Ambassador; Chapter Alpha

**Mark Joseph Zmarzly, Alpha Theta Chi 1998 . . . \$750**

University of Nebraska, Lincoln

Pursuing M.A. in English at the University of Nebraska

Major accomplishments: B.A. in English and communication studies with 3.71 GPA; Golden Key Honor Society; Chapter Zeta, recruitment chair; house manager

**Matthew Alexander Antush, Mu Zeta 2005 . . . \$500**

University of Denver

Major accomplishments: Finance major with 3.92 GPA; Best Delegate, COE 2002; Hornbeck Scholar (4.0 GPA for 2 consecutive quarters)

**Joseph Michael Hickson, III, Rho 2002 . . . . . \$500**

Lafayette College  
Pursuing judicial doctorate and MBA from Rutgers University  
Major accomplishments: Dean's List; Chapter Scholarship for Most Improved GPA; Chapter Delta

**Dominique Minjarez, Lambda Zeta 2004 . . . . . \$500**

St. Mary's University  
Major accomplishments: President's Scholarship; Martin Luther King Scholarship; Beta Beta Beta Biological Honor Society; managing editor, The Rattler newspaper; President's Ambassadors; Chapter Brotherhood chairman

**Jonathan Hilliard Scott, Delta Pi 2001 . . . . . \$500**

Georgia Southwestern State University  
Pursuing MSA in management at GSSU with 4.0 GPA  
Major accomplishments: Sigma Gamma Delta; Graduate Assistant; Delta Pi "Brother of the Year"; Chapter Beta and Iota

**Michael Jacob Spiro, Lambda 2003 . . . . . \$500**

University of California, Berkeley  
Major accomplishments: Architecture major with 3.25 GPA; Chapter Alpha, Social Chairman, House Manager, and Rush Chairman; IFC Rho Chi recruitment



**David Michael Musgrave, Mu 2003 . . . . . \$500**

Stevens Institute of Technology  
Major accomplishments: Computer engineer major with 3.6 GPA while co-oping; Dean's List all semesters; Tau Beta Pi; captain, varsity fencing; Eagle Scout; Chapter Beta, Delta, and Eta

**Tyler Campbell Sadek, Gamma 2003 . . . . . \$500**

Emory University  
Major accomplishments: Business major/minor in architecture 3.43 GPA; Dean's List 2 times; one of eleven interns selected for ABN-Amro North American Headquarters' Finance Associate Program; Chapter Alpha; Emory Christian Fellowship

Left to Right:

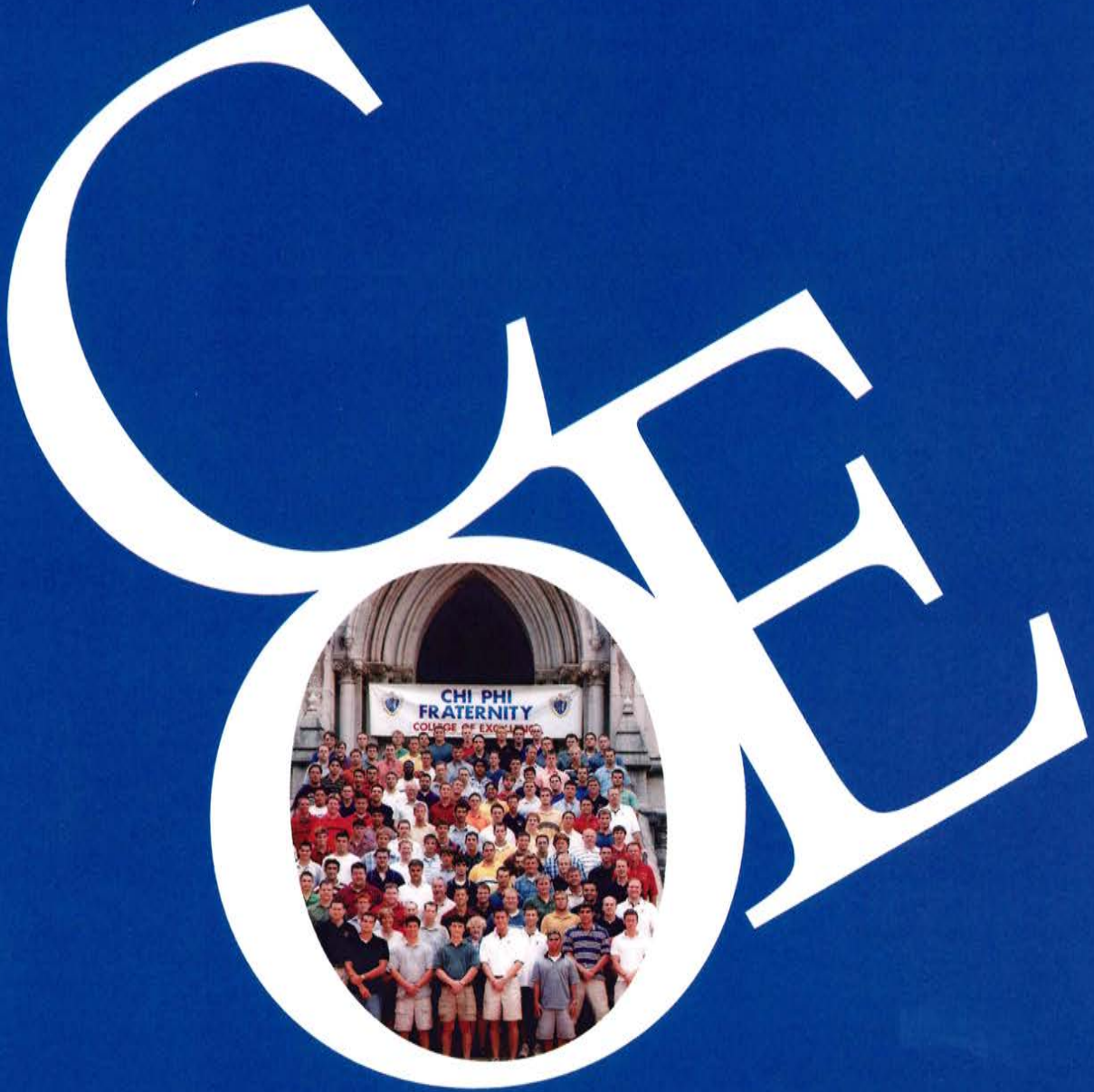
**Tyler Campbell Sadek**  
Gamma 2003

**Jonathan Hilliard Scott**  
Delta Pi 2001

**Michael Jacob Spiro**  
Lambda 2003



Vanderbilt University Nashville, Tennessee July 23-27, 2003



Be a more aware citizen Become a more able  
person Be the strongest Chi Phi you can be **2003**  
**Chi Phi College of Excellence**



## What to Expect

The COE curriculum is packed with a comprehensive schedule running from early morning until late night. Expect exciting programs, stimulating group discussions, and some friendly competition in sports and other interactive games.

Expect to meet Brothers from around the nation. Participants at COE come from chapters both large and small, and from schools of varying size and composition. Expect to meet outstanding Chi Phi undergraduates and distinguished alumni and to interact with leaders in the interfraternity world. COE is an opportunity not to be missed.

**“Finally attending COE was truly one of my greatest Chi Phi experiences. Every undergraduate Brother should plan to attend.”**

— Damien Mach,  
Mu Zeta 2002

Expect to share a room with a Brother from another Chapter. COE is action-packed, so don't expect to get a lot of sleep.

Your registration fee includes all lodging and meals for the duration of the program, all program materials, a COE T-shirt, and many Chi Phi “freebies.”

In an effort to provide the most effective learning and growth environment, the Chi Phi College of Excellence is a substance-free event.

## At COE You Will...



**“It was a great learning experience. COE prepared us for what will come in the next few semesters in our effort to become a good colony and chapter.”**

— Phillip Zavalla,  
Schreiner Colony 2003

- **Live and learn with hundreds of elite Chi Phis**  
The only word that can describe the COE experience is “intense.” Expect to eat, sleep, learn, teach, talk, walk, play, and grow with Chi Phi Brothers from around the country for five incredible days. The friendships you make, and the connections you form will serve you well for years to come.
- **Develop yourself as a person**  
We live in uncertain times. Today, more than ever, our society needs men of values, character and action. Our society, professions, and lives demand it. Being a Chi Phi is not just about a lifetime commitment to thousands of Brothers around the world – it is about becoming a responsible citizen whose actions benefit the greater society. How can you go further in life? Dedicate yourself to the values-based leadership that COE promotes.

- **Influence the future of the oldest Fraternity ever**  
Chi Phi and the interfraternal world are at a crossroads. Our future relies on men of strong character and leadership to determine the future of Chi Phi. Our success is dependent upon all of us. It is up to you to commit to values-based action for Chi Phi's growth and prosperity to become the leading Fraternity of our time. It starts now – at every chapter, with every Brother.
- **Have fun**  
Is it really even possible to gather more than a few Chi Phis and not have fun? Probably not. Every year COE receives rave reviews and evaluations because its participants had fun, learned a lot, and made friends. Why else have it?

**“COE was a phenomenal experience that allowed me to become a stronger Brother within both my chapter and my Fraternity. It's a vital part of Brotherhood development— every Brother should attend.”**

— Chris Barr,  
Delta Pi 2005

# *A Singular Achievement:*

# 2001-02



## 2001-2002 Recipients

Alpha Chapter  
University of Virginia  
Ryan Tiffany

Beta Chapter  
Massachusetts Institute of  
Technology  
Philip J. Lee

Gamma Chapter  
Emory University  
Louis G. Graff V

Epsilon Chapter  
Hampden-Sydney College  
Matt Friedman

Zeta Chapter  
Franklin & Marshall College  
Michael W. Kerr

Eta Chapter  
University of Georgia  
John W. Schmidt

Theta Chapter  
Rensselaer Polytechnic Institute  
Nathan L. Friedman

Iota Chapter  
Ohio State University  
John A. Agin

Kappa Chapter  
University of Wisconsin  
Ryan M. Osborn

Lambda Chapter  
University of California, Berkeley  
David P. Su

Mu Chapter  
Stevens Institute of Technology  
Thomas E. Sullivan III

Nu Chapter  
University of Texas  
Brian W. Siy

Xi Chapter  
Cornell University  
Dana J. Alexander

Pi Chapter  
Northwestern University  
Scott I. Harrison

Rho Chapter  
Lafayette College  
Christian J. Henry

Upsilon Chapter  
Hobart College  
Douglas F.H. Jones

Psi Chapter  
Lehigh University  
Andrew J. Basso

Omega Chapter  
Georgia Institute of Technology  
Joseph M. Wallace III

Alpha-Alpha Chapter  
University of North Carolina,  
Chapel Hill  
F. Bascome Majors

Alpha-Sigma Chapter  
Princeton University  
Alec A. Schmaier

Alpha-Tau Chapter  
University of Michigan  
Brandon M. Schultz

Alpha-Chi Chapter  
Ohio Wesleyan Chapter  
Joseph A. Kennedy

Alpha Delta Chapter  
Pennsylvania State University  
Michael S. Lasser

Epsilon Delta Chapter  
Oregon State University  
Benjamin J. Plummer

Zeta Delta Chapter  
University of Connecticut  
Dritar Vinca

Theta Delta Chapter  
University of Florida  
Brandon P. Ladoff

Iota Delta Chapter  
Indiana University  
Michael E. Baum

Rho Iota Kappa Chapter  
University of Rhode Island  
Nicholas J. Goodier

Delta Xi Chapter  
West Virginia Wesleyan College  
Joshua S. Nease



Created in 1924 in honor of Edwin Erle Sparks, Alpha-Chi 1884, Iota 1884, president emeritus of Pennsylvania State College [now University] and a truly great Chi Phi, the Sparks Memorial Medal is awarded annually to the man having the highest G.P.A. in each chapter and colony.

The Sparks Memorial Medal is Chi Phi's highest award for individual academic achievement, reserved exclusively for those Brothers who have excelled in their academic rigors. A truly singular honor, the Sparks Memorial Medal itself contains many historic symbols.

A bar pin bearing the fasces of the Hobart Order and containing a Greek word for "learning acquired by education" serves as the top anchor. A scarlet and blue ribbon, colors identical to those of the Hobart Order, suspends the medal

from the bar pin. The medal itself is an embossed replica of the old Princeton pin containing the symbolic swords of the Southern Order and the stars of the Princeton Order. At the top and bottom of the Phi is the name "Sparks Medal."

With the guidance of the Chi Phi Educational Trust, the faculties of the various colleges, universities, and institutions of higher learning select the winners based solely on academic performance. Since only one medal can be awarded to each chapter and colony, the task of selecting the recipients can sometimes be Herculean. In case of a tie, a winner is chosen according to extracurricular activities.

"The Sparks Memorial Medal is truly inspirational," explains Scott Henderson, executive director of the Trust. "As our oldest program, it serves as a testament to Brother Sparks's inspiration and provides much deserved recognition for these fine men."



# SPARKS

## *Memorial Medal*

Kappa Delta Chapter  
University of Rochester  
Daniel R. Hepworth

Lambda Delta Chapter  
University of Arizona  
Jason J. Scronic

Mu Delta Chapter  
Auburn University  
Courtney D. Edmondson

Nu Delta Chapter  
Florida State University  
Jonathan D. Hall

Xi Delta Chapter  
Florida Institute of Technology  
Elliott T. Bache

Rho Delta Chapter  
Oglethorpe University  
David S. Kallman

Sigma Delta Chapter  
University of California, Davis  
John S. Garrett

Psi Delta Chapter  
U. of North Carolina, Charlotte  
Kenneth E. Dixon III

Alpha Zeta Chapter  
State University of West Georgia  
John T. Cene

Gamma Zeta Chapter  
University of North Carolina,  
Wilmington  
James C. Buie

Delta Zeta Chapter  
University of South Florida  
Joseph S. Greeley Jr.

Phi Lambda Theta Chapter  
Bucknell University  
Alex R. Cochran

Epsilon Zeta Chapter  
Humboldt State University  
Christopher A. Peterman

Theta Zeta Chapter  
Texas A&M University  
Derek J. Dizon

Kappa Zeta Chapter  
Purdue University  
Adam J. Laker

Lambda Zeta Chapter  
St. Mary's University  
Richard A. Olague

Mu Zeta Chapter  
University of Denver  
Matthew A. Antush

Pi Zeta Chapter  
Binghamton University  
Douglas A. Leder

Tau Zeta Chapter  
Boston University  
Michael J. Marian

Psi Zeta Chapter  
University of Texas, Dallas  
Byron W. Campen

Omega Zeta Chapter  
University of North Florida  
Brent D. Hicks

Delta Pi Chapter  
Georgia Southwestern State  
University  
Michael F. Gilbert

Alpha Theta Chapter  
Oklahoma State University  
Timothy C. Glennon II

Beta Theta Chapter  
Chowan College  
Jonathan S. B. Bukva

Gamma Theta Chapter  
Indiana University of  
Pennsylvania  
Sam C. Kupchella

Clemson Colony  
Clemson University  
Joseph J. Piccirilli

East Carolina Colony  
East Carolina University  
Eugene M. Jones



The leaders of the Fraternity and Trust have made a joint commitment to revitalize the bonds of Brotherhood throughout the country with personal, face-to-face contact. New opportunities for "friend raising" have taken Ron Frank, Fraternity Grand Alpha; Adam Langley, Fraternity National Director; Jim Soderquist, Trust Chairman; and Scott Henderson, Trust Executive Director across the country. As the Creed states, "Whether on the road or in the chapter house, the hand of Brotherhood is always extended."

# ON THE ROAD IN 2002

**February 22-26**

**Massachusetts, Connecticut, and New York**

Not wanting to miss the Beta Chapter's annual Initiation Banquet, Brothers Soderquist and Henderson traveled through Boston on their way to New York City. While in "Beantown," they had breakfast with Gladfelter Circle member Stephen Hamm before meeting up with Jim Bueche, Tom Holtey, Dave Neuburger, Andy Wheeler, Bill Freeza, former Grand Alpha Jim Edgerton, and the many other Beta alumni attending the festivities at MIT.

Brothers Soderquist and Henderson with Beta alumni leaders Jim Bueche, Bill Freeza, and Tom Holtey



As they worked their way through Connecticut, Brothers Soderquist and Henderson broke bread with Thomas Gunn, Psi 1950, and his wife, Jean, and made stops in Storrs to see the Brothers of the Zeta Delta Chapter at the University of Connecticut and in Stamford for a visit with Frank Crabill, Alpha Theta Chi 1935. Brother Crabill has long since retired from the practice of law, but still enjoys telling stories of his youth, including the one about being chased off Willa Cather's alfalfa field by the famous author herself after he and his friends were caught playing football on her property.



**Top:** Zeta Delta Chapter members Craig Diamond, Craig Massey, and Scott Brown with Brothers Soderquist and Henderson

**Below:** Frank Crabill shows Scott Henderson photos from his younger years, including one of himself with the Queen of England

Upon their arrival in New York City, Brothers Soderquist and Henderson joined Jim's wife, Irene; Bob Miller, Alpha 1968, and his wife, Marylu; Bob Leo, Alpha 1966, and his wife, Dorothy, for an evening swapping old Alpha Chapter stories and news of family happenings. The following day, Brothers Soderquist and Henderson met with Richard Suttmeier, Omega 1966, at his office on Wall Street before having lunch with Craig Shields, Rho 1963. Later in the day, they visited Peter Ulmer, Gamma

1998, whose efforts led to his company's sizeable donation to the Trust. That evening, they crossed the Hudson River to see the Brothers of the Mu Chapter at Stevens Institute of Technology and have dinner with their chapter advisor and Trust Governor, Henry Carnevale, Mu 1980, before returning to the city.

**March 9**  
**Atlanta, Georgia**

With the revival of the Chi Phi Club of Greater Atlanta, Brother Henderson joined Scholarship Counselor Dr. Jonathan Richmond, Zeta 1962, Zeta Delta 1962, former Grand Alpha Ray Donohue, Omega 1961, and many other alumni for the return of the club's vaunted annual party. Brothers and their Chi Phi sweethearts from across the state of Georgia enjoyed an evening of good company, good food, and good dancing.

**April 11-16**  
**Texas**

Having spent much time as a Chapter Leadership Consultant in the state of Texas, Brother Henderson was pleased to return to the Lone Star State to reconnect with old friends and make new ones. His first stop was in Dallas, where he visited with Chuck Eisemann, Nu 1962; John Ferguson, Epsilon Delta, 1954; Devane Clarke, Nu 1950; and Sam Hocking, Tau 1957. Traveling south, he paid a visit to the Brothers of the Theta Zeta Chapter at Texas A&M University and stopped to see Jim Graves, Nu 1948, at his home on Lake Conroe.

The next morning in Houston, Brother Henderson enjoyed breakfast with Harris Leven, Kappa Delta 1969, a steady contributor and a contemporary of current Grand Eta George MacDonald. In the afternoon, he met with Jim Graves, Bill Byrd, and Steve Hopkins from the Nu Chapter to discuss their plans for the Byrd/Graves Campaign to build a new chapter house at the University of Texas.

The following day, Brother Henderson connected with former Trustee and former dean of the College of Excellence, D. Fort Flowers, Omega 1983, before venturing on to Austin to say hello to the Brothers of the Nu Chapter and survey the plans for the new chapter house in person.

Traveling on to San Antonio, Brother Henderson met with former Chapter Leadership Consultants Carl Michel, Lambda Zeta 1999, and Blake Benschoter, Lambda Zeta 1998, plus a number of undergraduate and alumni Brothers of the Lambda Zeta Chapter for dinner and a tour of campus.

#### May 4-7

#### Chicago, Illinois, and Madison, Wisconsin

The Pi Chapter at Northwestern University, in honor of its 50th Anniversary, invited Brothers Frank, Langley, and Henderson to attend a special alumni celebration on the banks of Lake Michigan. During the afternoon, Pi Chapter alumni leaders Joel Sternstein and Scott Gillard facilitated a planning retreat to discuss the future of the chapter and the alumni association. Later, undergraduates, alumni, and their sweethearts gathered at the NU Lakeshore Clubhouse in downtown Chicago to celebrate Pi's Golden Anniversary. Brothers Frank, Langley, and Henderson enjoyed their time at the event, especially having the opportunity to meet Don Armstrong, Roy Lamberton, Edgar Merson, Arthur Eichlin, and numerous other alumni.

After the anniversary celebration, Brothers Langley and Henderson continued on to the Kappa Chapter at the University of Wisconsin in Madison to meet with Terry Brown and Andy DeMarco of the Kappa Chapter alumni board to discuss the possibility of establishing the Kappa Chapter Excellence Fund. These two gracious hosts provided a walking tour of campus and introductions to the undergraduate brothers.

#### May 14-16

#### Washington, D.C.

In town to attend a special meeting of the North American Interfraternity Conference, Brothers Soderquist, Langley, and Henderson paid a visit to former U.S. Senator Charles S. "Chuck" Robb, Xi 1961, Kappa 1961. Brother Robb is enjoying life in the private sector and staying busy between his faculty position at George Mason University and membership on various foundation and corporate boards,



National Director Adam Langley and Trust Chairman Jim Soderquist with Brother and former U.S. Senator Charles "Chuck" Robb.

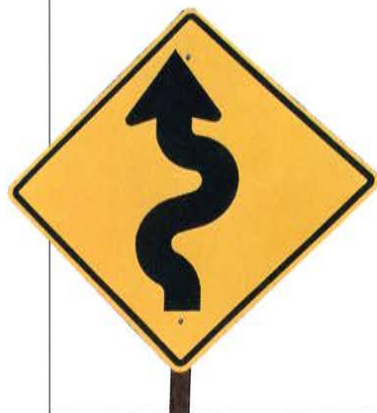
while serving as co-chair of an effort to bring Metro rail to Dulles airport. This past spring, he and his wife, Lynda, were honored to serve as visiting fellows at Harvard University.

During their stay in D.C., an alumni reception was held at the historic Willard Hotel to help stimulate interest in resurrecting the National Capital Chi Phi Club. About 30 alumni enjoyed the evening, including Grand Eta George MacDonald, Kappa Delta 1970; former National Director Rick Hess, Phi Lambda Theta 1986; Ernie Rosenberg, Kappa Delta 1968, president of the US Soap and Detergent Association; and Tim McCrum, Zeta 1980. The Gamma Chapter (Emory University) was well represented with ten alumni, as was the Alpha Chapter (University of Virginia) with six alumni.



A strong showing from the Gamma Chapter helped make the D.C. alumni reception at the Willard Hotel a success

For the remainder of the trip, Brothers Langley and Henderson participated in NIC meetings, including a special reception on Capitol Hill with Greek alumni who are members of Congress and the Executive Branch to bring greater awareness to the



lobbying efforts of Greek letter organizations on issues of importance, including fire sprinkler safety. Prior to leaving, Brothers Langley and Henderson had the opportunity to meet former Trustee and former Undersecretary of Agriculture, Daniel Amstutz, Iota 1954. Now semi-retired, Brother Amstutz serves on The Ohio State University Foundation board as well as being a volunteer leader with other charitable causes.



A few of the Brothers who traveled to Greenville, South Carolina, for Brother Kitchin's funeral with Tommy and Billy Kitchin (standing 3rd and 4th from left respectively)

**May 17**

**Greenville, South Carolina**

On a somber note, Brothers Soderquist, Langley, and Henderson traveled to South Carolina to attend the funeral of Bill Kitchin, Alpha 1947. Among the other Chi Phi brothers who paid their respects were Jack Cook, former Grand Alpha Fred Kieser, Chuck Allen, former Grand Alpha and former National Director Ray Donohue, and former National Director Steve Schneiderwind. It was with deep sadness they said their final good-byes to Brother Kitchin and extended condolences to his wife, Diane, and children, including Billy, Rho Delta 1977, and Tommy, Rho Delta 1979.

**June 8**

**Omaha, Nebraska**

Never one to pass up a trip to his hometown of Omaha, Brother Henderson represented the national office at the annual Alpha Theta Chi Chapter golf outing. With the chapter facing various challenges, Brother Henderson met with its alumni board to discuss future plans.

**Wednesday, June 19 - Sunday, June 23**

**San Francisco, California**

As seen in the most recent Chakett, the 137th Chi Phi Congress was a grand celebration enjoyed by the undergraduates, alumni, and spouses in attendance. Brothers Frank, Langley, Soderquist, and Henderson wish to thank everyone who helped make it such a great success.

**Wednesday, July 24 - Sunday, July 28**

**Nashville, Tennessee**

After five intense days, Brothers Frank, Langley, Soderquist, and Henderson came away impressed with the exceptional quality of this year's COE and its attendees. Chi Phi's future is definitely in good hands.

**Tuesday, September 10 - Sunday, September 15**

**Cincinnati, Ohio; Bloomington, Indiana; and Indianapolis, Indiana**

Passing through the Midwest, Brothers Soderquist, Langley, and Henderson spent some time with former Grand Alpha Bill Jeckell, Iota 1934, Omicron Delta 1969, and his wife, Betty, at their home in Cincinnati. It was good to hear Brother Jeckell's stories of his days as an undergraduate and provide him with an update of Chi Phi's progress.

[Editor's note: It is with great sadness we report the passing of Betty Jeckell, who succumbed to cancer at the end of September. We will miss her, our Chi Phi sweetheart.]



Former Grand Alpha Bill Jeckell shows off his Buckeye pride alongside National Director Adam Langley and Trust Chairman Jim Soderquist



Brother Walter Maerki with his guests from the Chi Phi Fraternity and Chi Phi Educational Trust

Later in the day, Walter Maerki, Alpha-Chi 1948, hosted the group at the Maketewah Country Club for an enjoyable afternoon. After being taught a few lessons by Brother Maerki on his home golf course, Brothers Henderson, Langley, and Soderquist settled the debts they incurred. But they did so gladly, having enjoyed the opportunity to become better acquainted with Brother Maerki.

The following morning, Michael Crotty, Kappa 1971, met with Brothers Soderquist, Langley, and Henderson for breakfast to catch up on the happenings of the previous year. Afterward, the three travelers stopped by the Greater Cincinnati Community Foundation to say hello to E. Miles Wilson, Alpha-Chi 1986, before meeting Jim Hartsel, Rho 1962, at the Montgomery Inn.

Before leaving Cincinnati, the trio spent the latter part of the afternoon with former Grand Alpha, Clayton Scroggins Alpha-Chi 1942, and his lovely wife, Jeanne. Of course, no trip to Cincinnati would be complete without sampling some of that city's famous chili, which they did at Skyline Chili under the expert guidance of Brother Scroggins, a well-known chili aficionado.

As they traveled toward Indianapolis, Brothers Soderquist, Langley, and Henderson made a small detour to pay a visit to the Iota Delta Chapter at Indiana University. Coincidentally, it was the same night the chapter and their alumni were preparing

for the fall semester's recruitment. After a guided tour of the house to see the results of recent house improvements, the Iota Delta Brothers shared the plans for the proposed wing addition and related improvements. With initial fundraising efforts underway, the Iota Delta alumni and undergraduates are excited for the prospects for the future.

Upon their arrival in Indianapolis, the peripatetic Brothers met with Trustee Bill Byrd, Nu 1953, for a fundraising seminar conducted by the North American Interfraternity Conference Foundation Section. On Saturday evening, Trustees Steve Schneiderwind, Alpha Theta Chi 1973, and Larry Green, Sigma Delta 1972, joined the group for a special alumni reception at The Columbia Club. Over thirty alumni and sweethearts from the Indianapolis area helped make the reception a memorable event.



The Brothers and Alumni of the Iota Delta Chapter proudly display the architectural renderings for the proposed addition to the chapter house

After conducting a quarterly meeting of the Trust the next day, the foursome said their goodbyes and returned home with the satisfaction of completing another successful trip.

The travels of our volunteer leaders and paid staff emphasize their commitment to visit personally with as many alumni as possible. Being "on the road" gives them a real sense of renewed vigor and spirit within Chi Phi today, most notably among our alumni members. Their energy and excitement is symbolic of the lifelong commitment that has been the hallmark of Chi Phi since its founding.



Trust Chairman Jim Soderquist is greeted by Frank Kovacs, a former Trustee and former Grand Council member, during the Indianapolis alumni reception

# 138th Chi Phi Congress



Chi Phi Brothers and Sweethearts are invited to gather in New York City for the annual Chi Phi Congress - a celebration of Brotherhood from June 19-22, 2003. Don't miss this special Chi Phi event!

The Chi Phi Congress offers a unique opportunity to form new friendships and renew old bonds, while helping chart the future success of the Fraternity. A tantalizing mix of activities and events for socializing and sightseeing is being planned. Here is a sample of what awaits you:

Statue of Liberty; the neon lights of Time Square and Broadway; a walk through Central Park; world-class shopping and five-star restaurants; the Chi Phi National Leadership Dinner; a special day trip for Sweethearts; Chi Phi's first-ever Financial Symposium for alumni; and the 138th Chi Phi Congressional Banquet.

**BRING YOUR FAMILY! REUNITE WITH YOUR CHAPTER BROTHERS! MEET OTHER CHI PHIS!**

Mark your calendar now and look for more details in the winter issue of the Chi Phi *Chakett*.

# Alumni \$ SUPPORT @ Work

## CHI PHI ADDS TWO KEY POSITIONS



Meeting this year in San Francisco, the 137th Chi Phi Congress approved the funding of two new staff positions for the national office: an assistant director of undergraduate services and an associate director of alumni services. Both positions were filled over the summer, bringing Matt Merkel, Beta Theta 2000, on board to work with alumni and Rich Kuerston, Mu Zeta 2002, to help with undergraduate services. This infusion of manpower—owed in large measure to generous alumni support combined with stringent fiscal management—will allow the national staff to re-energize its efforts in two vital areas of the Fraternity.



These staff additions are a direct result of the strong support received from loyal alumni last year. The alumni who gave to the Fraternity can be proud that their contributions made a direct impact on the strength of the Fraternity and, therefore, the strength of their own chapters. This achievement represents, in a tangible way, the results Chi Phi can achieve through regular and widespread alumni support.

Matt Merkel, named as Chi Phi's Chapter Advisor of the Year in 2000, has also been active with the Fraternity's award-winning College of Excellence as a member of the Dean's Team and faculty. Formerly an assistant professor of communications and theater at Chowan College in North Carolina, Brother Merkel brings valuable experience to his new responsibilities at Chi Phi.

"From my vantage point," he remarks, "the element that strikes me most is that our alumni want to be involved. I'm meeting and talking with alumni from all over the country who are excited at the prospects of re-connecting. They, in turn, are volunteering and offering to step up to the challenge of helping other alumni groups. It is building once again that sense of Brotherhood that some may have missed; for others, it is a renewal to the principles of our Fraternity that they hold dear."

With Matt Merkel's arrival, alumni now have their own point person in the national office. Whatever their need—starting a local club, becoming involved with a chapter, assistance with an alumni association, contacting long lost Brothers—alumni will find greater resources at their disposal. Extending the reach of the national office closer to home, Grand Alpha Ron Frank has also mandated alumni regions or "super-zones" that will each have a Regional Alumni Counselor. As these plans develop, alumni can count on more communication with more frequency, which translates into a new level of service from the national office.

Like Brother Merkel, the new assistant director of undergraduate services, Rich Kuerston, emphasizes the value of alumni in the work of the Fraternity. States Kuerston, "When I meet with alumni, the first thing I talk to them about is how much their involvement means to the young men. In fact, Chi Phi's undergraduates at our 60 chapters and colonies need role modeling now more than ever. Students everywhere are coming from difficult times and difficult homes. Many don't receive the

support they need from the traditional sources. It is, therefore, all the more crucial for our chapters to be havens for the Brotherhood and steadfast values that Chi Phi instills."

Already knowledgeable about the workings of the Fraternity after two summer internships and a stint as dean of marketing for the College of Excellence, Rich brings vigor and enthusiasm to his job. Since being hired in June, he has redesigned the Fraternity's New Member Resource Book, contributed to the Summer 2002 *Chakett*, helped with Chi Phi's annual Congress and COE, and worked in-depth with eight Chi Phi chapters.

A recent swing through the Northeast took him to Rhode Island, Connecticut, and upstate New York before culminating in a four-day program with the Tau Zeta Chapter and its alumni in Boston.

Comments Brother Kuerston, "While being on the road visiting chapters requires a tremendous amount of energy, I love every second. Some of our chapters are a challenge to 'get through to,' but some of them are models of open-mindedness. They may not always like what we suggest, but they listen. That makes all the difference."

In summarizing the benefits of adding two new professionals to the staff, National Director Adam Langley points out that both Matt and Rich have already produced tangible results and are being warmly received in their travels around the country. "We are deeply appreciative of the alumni support which enabled us to effectively double our staff resources. I also want to remind alumni how much the Fraternity is dependent on their time and talents, in addition to their treasures."

As Langley explains, "Chapters need guidance, mentoring, and role-modeling 365 days a year. All the staff in the world cannot meet those needs. It's the alumni in the trenches day in and day out who are making a lasting impact. Sometimes the most beneficial assets to a chapter are the six to ten alumni who have an active role in the chapter's everyday operations. Sometimes, it's two alumni in the back of the chapter meeting who can 'connect the dots' for the undergraduates when they can't do it for themselves. They can help the chapter not only avoid serious or costly mistakes, but also strive for excellence...simply by being there."



**Top: Matt Merkel at his desk in national office**

**Below: Rich Kuerston reviews marketing materials for the 2003 College of Excellence**

# Proving that “Not for Four Years, but Forever” Starts Now

# 18

Who is needed to create new colonies and chapters at universities across the nation? Who constitutes the best resource for Chi Phi's chapters? Who represents 94% of living members of the Chi Phi Fraternity? Who provides the greatest amount of support for Chi Phi's endeavors? One word answers all of these questions—alumni.

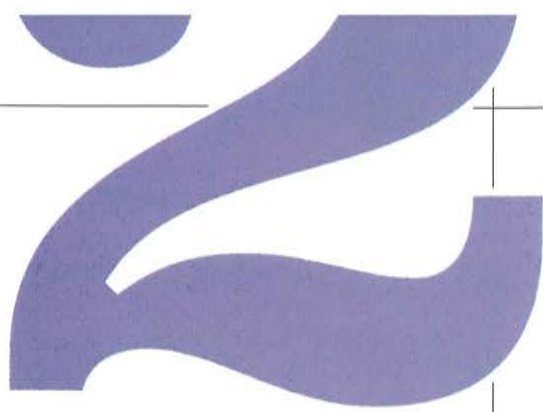
Many people do not realize how important dedicated alumni are to the operations of the national organization, as well as to its sixty chapters and colonies. Chi Phi's alumni members serve as great mentors, role models, and teachers for the undergraduates. Moreover, their generosity is key to the work of the Chi Phi Educational Trust.

Spurred by the fact that only 6.95% of living alumni have made a contribution in their lifetime, the Chi Phi Educational Trust unveiled the “Men of 1824” this summer to increase that percentage by tapping the Fraternity's newest members. Reserved exclusively for undergraduates and alumni who have graduated within the last five years, the Men of 1824 offers individuals the special opportunity to join the ranks of Chi Phi's elite contributors by making a gift of only \$20 or more.

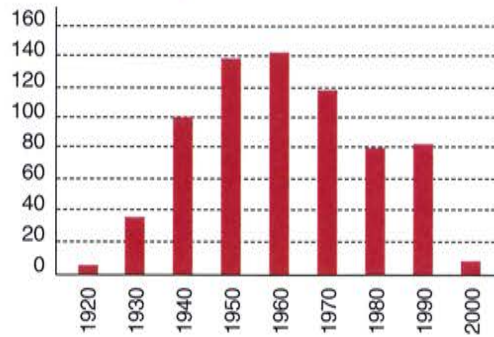
“Today's undergraduates are tomorrow's alumni. If we want to increase alumni support, we should encourage these men to start contributing now,” declares Grand Theta David Stout, Lambda Delta 2003, who is working alongside Grand Iota Michael “Bobcat” Williams, Delta Pi 2003, to promote the Men of 1824 among the Fraternity's undergraduate members.

As the undergraduate representatives on the Grand Council, Brothers Stout and Williams take their role seriously in helping to foster stronger relations between Chi Phi and its members. With the help of former Grand Theta Jonathan Bukva, Beta Theta 2002, these Brothers championed the new giving program during the 137th Chi Phi Congress, the 15th Annual College of Excellence, and various other interactions with their fellow undergraduates.

“Not many people get the chance to be a Founding Father of anything,” explains Brother Williams. “This year, every undergraduate and young alumnus can become a Founding Member of



Number of 2001 Trust Donors  
by Decade of Graduation



the Men of 1824. By joining, these men will show their belief in Chi Phi's future; provide important support for the Trust's programs, such as COE and the Chi Phi Scholarship Program; and hopefully inspire other alumni to either start giving or, if they already donate, to give more."

As the accompanying graph shows, the majority of Trust donors do not begin contributing until twenty years or more after graduation. By increasing the number of younger contributors and encouraging their habitual giving, the Trust could realize a significant increase in contributions as this pipeline of donors grows.

"The Men of 1824 represents a sea change for Chi Phi," surmises Brother Bukva. "It allows Brothers to get into the giving spirit while they are still closely connected to their undergraduate chapters and the Fraternity. This is a huge stride in instilling a lifetime commitment."

The Men of 1824 is also designed to promote giving among young alumni. Josh Price, Epsilon Delta 1998, is the point person for this phase of the new program. As a member of the Trust's Board of Governors, Brother Price appreciates the importance of increasing contributions to the Trust. At the same time, he recognizes the financial constraints on new graduates.

A recent law school graduate, he notes, "I have made a concerted effort to contribute as much as I can to Chi Phi every year, even though with a car payment, rent, student loans, and other expenses, it can be challenging to find the money. Still, I firmly believe we all should contribute something each year, no matter the amount."

Leveraging the special bond between a son and his parents, the Men of 1824 will offer parents of current undergraduates an opportunity to contribute as well. States Trust Executive Director Scott Henderson, Alpha Theta Chi 1995, "This year, the Trust will send parents a special solicitation letter inviting them to make a contribution in their son's name, thereby ensuring his place among the Founding Members of the new giving society. This way, parents can celebrate their son's connection to America's oldest social fraternity while helping to make a difference in the lives of its members."

Chi Phi promises to benefit from the long-term effects of this new program. Young alumni and undergraduates are taking steps to get into the habit of giving, while parents are honoring Chi Phi in the name of their sons. As they grow older, the Men of 1824 will inspire others through their support of Chi Phi "not for four years, but forever."



*the men of*  
**1824**  
*Chi Phi*

Preparing for the

# Golden Years:

## A LONG-TERM CARE INSURANCE PRIMER

Recently, Chi Phi forged an agreement with MassMutual, one of the strongest mutual life insurance companies in the United States, to offer long-term care (LTC) insurance to undergraduate and alumni members, as well as their family members. This includes parents, grandparents, children, aunts, uncles, cousins, and stepfamily members. The program allows eligible individuals to purchase this valuable coverage at a 15% discount from normal rates. The following article, by Brock Jolly, Alpha 2000, offers a primer on long-term care insurance and what individuals should know when considering their options.

Just three short years ago, my undergraduate chapter celebrated its 140th anniversary, in conjunction with the 175th anniversary of Chi Phi nationally. Throughout the weekend, I remember listening to the stories of my fellow Brothers who had graduated long before my time. Their accounts of undergraduate days of mayhem and revelry (the ones we all tend to remember) were priceless. I guess some experiences are simply timeless—proving once again the value of Chi Phi and the fraternity system as a whole.

After the weekend, I realized that the stories don't change much from generation to generation. Sure, the faces change, fashion changes, and technology advances, but Chi Phi Brothers are inherently the same across the ages. I know that I could never imagine one of my pledge Brothers needing long-term care, let alone needing care myself. However, reality tells a different story.

When asked how they will spend their golden years, many Americans talk of travel, golf, spending time with grandchildren, or living at the beach. Often, they find it difficult to imagine needing long-term care, or even depending on others for assistance. But the reality is that 71.8% of Americans over the age of 65 will use some form of long-term care in their lifetime. This likelihood is greater than your chances of needing major surgery, having a home burn down, or being involved in a major car accident. Yet most of us would not be caught without health, homeowners, or automobile insurance.

Most Americans simply fail to consider the financial and emotional drawbacks of not having a carefully constructed LTC plan—whether it involves insurance or not. Before considering a solution, many Americans believe that Medicare will pay for long-term care. However, when Medicare started in 1965, it was designed to pay for short-term, acute

illnesses. It was never intended to pay for long-term care. Qualification for benefits is becoming increasingly more difficult as baby-boomers push the envelope of Medicare and social security.

To qualify for Medicare, an individual must incur a three-day hospital stay, followed by care in a skilled nursing facility within thirty days of leaving the hospital. Admission to the facility must be for the same reason as the entrance to the hospital. Finally, the care must be restorative in nature. This means that if you have a stroke and recover to 75% of your original capabilities, your assistance stops. If you have Alzheimer's, your assistance ceases because you are not getting better.

If you can jump through all of these hoops, Medicare will pay for the full cost for the first twenty days. From days 21-100, Medicare will pay the full cost, subject to a deductible. This deductible changes annually, but current deductibles are around \$100 per day. After day 100, Medicare cuts off completely. If you are a military retiree, Tri-Care for Life will pay your deductible and will cover up to 120 days. After this time period, the financial assistance cuts off completely. For more details, visit the web site [www.medicare.org](http://www.medicare.org).

Many people also believe that family members will pay for or provide LTC assistance. However, with dual-working families, and families living farther apart, this can be a logistical problem, not to mention the fact that a long-term care situation may not be the most dignified experience for parents and children.

Finally, couples and individuals often say that they have plenty of money to cover a long-term care stay. While this may be true, most can think of better ways to use their own nest egg than paying for long-term care. Even if money is not an issue, perhaps LTC coverage is even more important as a way to protect this hard-earned money.

As with any insurance policy, LTC is a gamble. However, looking at the odds of using your policy, it seems like a gamble worth taking. For most people approaching retirement, or those who are already retired, the decision to purchase, or not to purchase LTC insurance may be one of the most important planning decisions you will ever make. In fact, I tell all of our planning clients over the age of 40 that unless they have a long-term care policy, they only

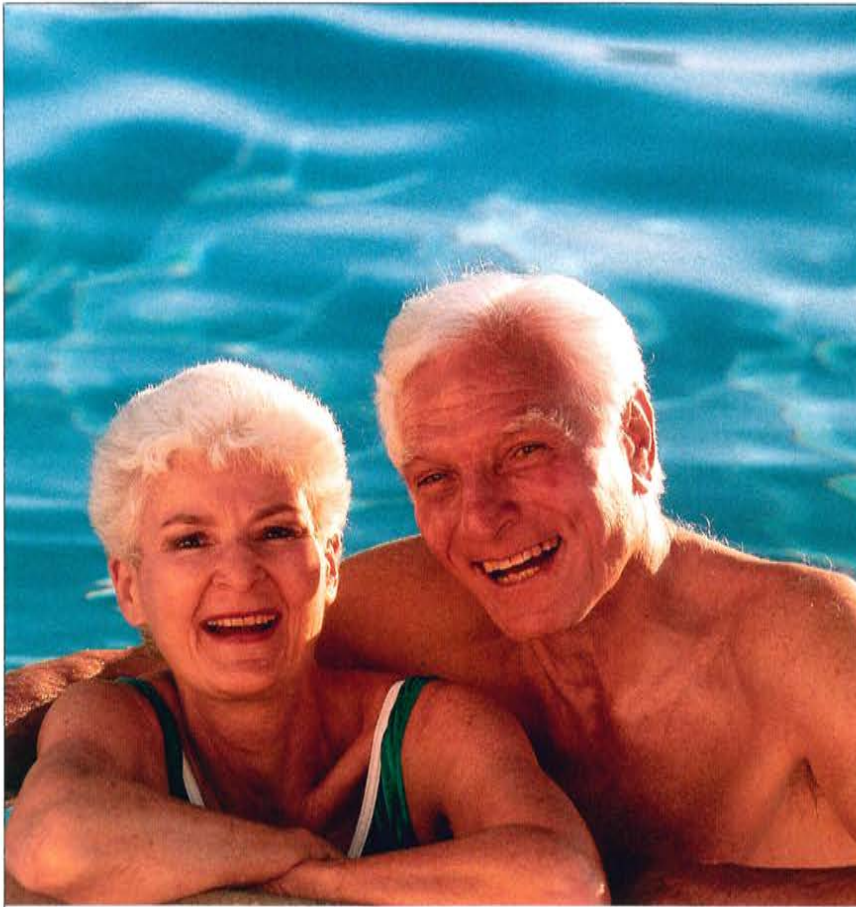
have investments, rather than a true financial plan. Thus, it's important to know what you're buying, and how to buy properly.

When building a LTC policy, you have four main options. The first option is the daily benefit amount, which is the amount that your policy will pay per day. Check to see what costs average in your area—your daily benefit amount should reflect this figure. You can choose to have the benefit match the entire cost, or choose to have your policy pay only a portion of the average cost. Your second choice is the benefit period, which is the length of time that your policy will pay. This can be anywhere from two years to lifetime benefits.

With most policies, these two figures combine to form what is known as a pool of money. Think of this as your LTC bank account. The pool is determined by multiplying your daily benefit by the benefit period by 365 days. As long as there is money in the pool, your benefits can continue beyond your chosen benefit period.

Your third option is the elimination, or waiting period. Think of this as your deductible. In LTC, the deductible is in days, rather than dollars. This is the number of days of care that you pay out of your own pocket, Medicare will pay, or someone other than insurance company XYZ will pay. Your options range from 0-730 days. The most popular elimination periods are between 90 and 100 days, since





Medicare could potentially pay up to 100 days. Most people also reason that if they had to pay for long-term care out of their own pockets, they could manage to do so for about three months.

Your fourth, and perhaps most important option, is inflation protection. Typical inflation options are 5% simple and 5% compound. Just like they sound, these options will increase your daily benefit by a flat, equal 5%, or by 5% compounded annually. Obviously the compound option is more expensive. A useful rule of thumb is that if you are over the age of 68, look at simple inflation, and if you are under this age, look at compound inflation. This is because the younger you are, the longer you should have to allow your policy to grow. You do, of course have the option not to add inflation protection. With some companies, you will still be given the option every three years or so to increase your daily benefit amount, depending on how the consumer price index rises with regard to LTC.

Finally, with any policy, you will have a cavalcade of bells and whistles to add to your policy. Many of these

riders are not worth what you might pay for them. Some of them are. With the policy endorsed by Chi Phi, many benefits that are riders with other companies are included in the base policy. These include a restoration of benefits and a joint waiver of premium.

Depending on your circumstances, you may want to include the indemnity benefit or the full nonforfeiture benefit riders. Typical policies are based on a reimbursement model, meaning if you have a \$200 daily benefit, and only spend \$150 one day, the remaining \$50 will stay in your pool of money for later use. With the indemnity rider, you will receive the entire \$200, which can be used for anything you choose—medicine, care by friends, clothes, or even a new car.

People often ask, "What if I buy a policy, and then never use it?" With the nonforfeiture benefit, if you never use care, or if you only use a portion of your benefit pool, the pro-rated portion of your premiums paid will be returned to your estate, or another beneficiary, upon your death.

With a qualified LTC policy, you qualify for benefits when you can no longer perform two of six activities of daily living (eating, bathing, dressing, toileting, transferring, and maintaining continence). In addition, if you have a purely cognitive impairment, you can also qualify for benefits. Your primary care physician must certify this condition. With most companies, once you start receiving benefits, you will stop paying premiums.

Long-Term Care insurance is certainly not the right solution for everyone. Policies are not inexpensive. Why? Because long-term care is not inexpensive. I have seen in my own family the immense financial and emotional burden LTC can cause. I would not wish this experience upon anyone.

So unless you received your crystal ball in the mail last week, please carefully consider a long-term care policy. If you have looked into long-term care coverage in the past, maybe this is the time to look again. With the discount being offered by Chi Phi, there is perhaps no better time to think about protecting your hard-earned money, and those you care about most.

For questions or more information, please write to: Capitol Financial Partners, c/o Chi Phi LTC, P.O. Box 3303, West McLean, VA 22103. Telephone inquiries may be directed to Brock Jolly at (800) 969-2362.

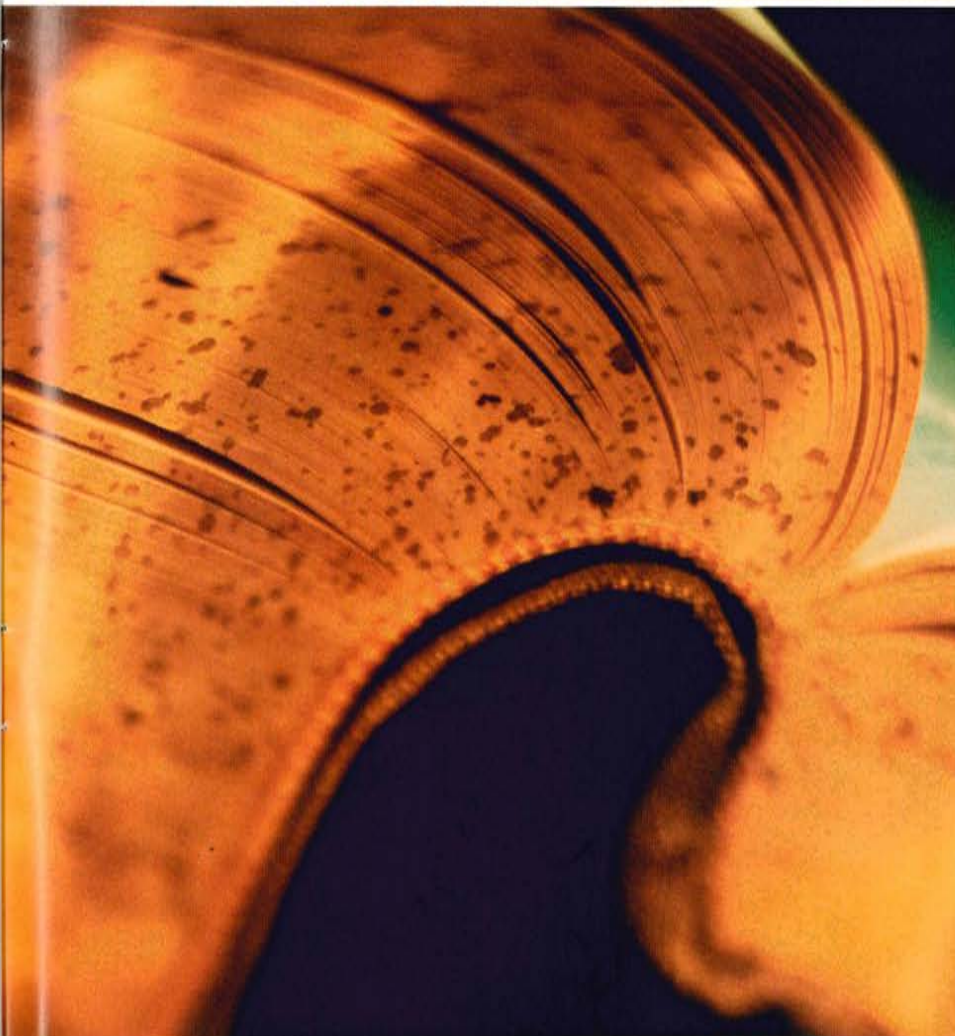


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# Regional Alumni Counselor Program

Noting that “there remains a need to increase voluntary alumni involvement,” Grand Alpha Ron Frank recently revived the Regional Alumni Counselor (RAC) program, which had been an integral part of Chi Phi for many years. As in the past, Regional Alumni Counselors will serve as an additional resource and contact for chapters and alumni associations within a geographic zone.

“We are changing the structure of the Fraternity by establishing regional zones throughout the country,” states Brother Frank. “Each region will have a Regional Alumni Counselor who will report to the Grand Council and National Office on a regular basis and serve as a front line resource for our chapters and alumni associations.”

Alumni have been identified to serve in the role of RAC for five of the seven regions with the hopes of fulfilling the additional two positions within the very near future. Alumni are invited to contact Grand Alpha Frank if interested in serving in this capacity.

The primary purpose of these alumni leaders will be to service 5-10 area chapters and alumni associations in addition to the efforts of the national staff. As volunteers are recruited, the current regions will be altered to allow for RACs to work with 3-5 chapters each, thereby increasing the attention each of them receives.

RACs will coordinate programs to enhance the alumni involvement at each chapter and continue to develop alumni leadership. In addition, the RACs will support the Regional Leadership Alliances hosted by the Fraternity each spring. Work has already begun to create a repository of resources that will be useful to our existing alumni

associations and house corporations. And, finally, RACs will support the creation of geographic alumni clubs wherever possible.

Regional Alumni Counselors will structure a support group with other key alumni members within the region, visit each chapter within the region at least once each year, and hold an annual regional meeting with representatives of each chapter, alumni association, housing corporation and club within the region in conjunction with the annual Regional Leadership Alliances.

## Purpose of the Regional Alumni Counselors:

- Provide more opportunities for volunteer alumni leadership in our Fraternity
- Provide training opportunities at a regional level
- Improve geographical representation at the national level
- Support an aggressive expansion policy by the Fraternity
- Improve communications among regional Chi Phi member organizations (chapters, alumni associations, housing corporations, and clubs)



**The following alumni are currently serving as Regional Alumni Counselors and can be called upon as a resource for you:**

**NORTHEAST REGION**

Todd Wagar, Nu Delta 1995  
wagar@chipherg.org  
(617) 574-7166

*Includes: Beta Chapter, Zeta Chapter, Theta Chapter, Mu Chapter, Xi Chapter, Rho Chapter, Upsilon Chapter, Psi Chapter, Alpha-Sigma Chapter, Zeta Delta Chapter, Rho Iota Kappa Chapter, Kappa Delta Chapter, Tau Zeta Chapter, Pi Zeta Chapter.*

**MID-ATLANTIC REGION**

Currently Vacant  
*Includes: Alpha Chapter, Epsilon Chapter, Alpha-Alpha Chapter, Delta Xi Chapter, Psi Delta Chapter, Gamma Zeta Chapter, Beta Theta Chapter, Clemson Colony, ECU Colony.*

**SOUTHEAST REGION**

Louis Hawkins, Mu Delta 1988  
hawkins@chipherg.org (334) 887-8878  
*Includes: Gamma Chapter, Eta Chapter, Tau Chapter, Omega Chapter, Mu Delta Chapter, Rho Delta Chapter, Alpha Zeta Chapter, Delta Pi Chapter.*

**FLORIDA REGION**

Sunny Handa, Xi Delta 1989  
handa@chipherg.org  
(321) 752-0750  
*Includes: Theta Delta Chapter, Nu Delta Chapter, Xi Delta Chapter, Delta Zeta Chapter, Omega Zeta Chapter.*

**MIDWEST REGION**

Rich Lane, Kappa Zeta 1993  
lane@chipherg.org  
(765) 449-8193  
*Includes: Iota Chapter, Kappa Chapter, Pi Chapter, Alpha-Tau Chapter, Alpha-Chi Chapter, Alpha Delta Chapter, Iota Delta Chapter, Phi Lambda Theta Chapter, Kappa Zeta Chapter, Gamma Theta Chapter.*

**TEXAS REGION**

Steve Hopkins, Nu 1999  
hopkins@chipherg.org  
(512) 479-8141  
*Includes: Nu Chapter, Theta Zeta Chapter, Lambda Zeta Chapter, Psi Zeta Chapter, Schreiner Colony, UIW Colony.*

**WEST REGION**

Currently Vacant  
*Includes: Lambda Chapter, Epsilon Delta Chapter, Alpha Theta Chi Chapter, Lambda Delta Chapter, Sigma Delta Chapter, Epsilon Zeta Chapter, Mu Zeta Chapter, Alpha Theta Chapter.*

Alumni interested in filling the vacant Regional Alumni Counselor positions should contact Grand Alpha Ron Frank at frank@chipherg.org.





Each issue of *True Blue* delves into the Chi Phi archives to celebrate the Fraternity's rich heritage and tell the stories of its truly remarkable members. As readers enjoy the anecdotes and histories of Brothers before them, they will find that some things never change: love of Chi Phi, the value of lifelong friendships, and the rewards of giving to the next generation.

This publication features an article written by Benjamin S. Sanderson, Phi (Amherst College) 1879, entitled "The Fraternity Ideal," which appeared in the *Chi Phi Chakett* in May 1895. At that time, Chi Phi had some twenty chapters in existence, twenty-three extinct chapters, and a membership roll approaching three thousand. Most chapters averaged sixteen undergraduate members and initiated about four to six men each year.

Spreading from New England to the South, chapters existed mostly autonomously, since there was no national entity outside of the annual Congress, then known as the "Convention," to support them. Though some alumni were involved with the Fraternity, the majority of fraternal activities and efforts focused on the undergraduate members.

One of the first to recognize the untapped potential of alumni, Brother Sanderson took it upon himself to rally greater involvement from the older members of the Fraternity.

After his ordination as an Episcopal priest in New York, Sanderson remained active in the Fraternity by contributing articles to the *Chakett* and attending the annual Conventions.

Shortly before his piece in the *Chakett* was published, Brother Sanderson had been reluctantly nominated and elected Grand Alpha during a contentious Convention. Declining the office, he gave his word to stay involved and serve as Grand Alpha at a later date, if the Brothers deemed him worthy.

True to his word, Brother Sanderson maintained his presence on the national level, accepting the position of Alpha of Congress in 1899 and two terms as Grand Alpha (1903-07). Under his leadership, Chi Phi pressed forward with expansion efforts and continued to encourage alumni to stay involved.

Brother Sanderson's message in "The Fraternity Ideal" elucidates his perspective of the Fraternity's role in the lives of its alumni and their involvement. It is not clear what inspired his words; however, what is singularly notable is the relevance of his message today. As Chi Phi continues to reach out to all its members, Benjamin S. Sanderson's message over a century ago stands the test of time:



Benjamin S. Sanderson  
Phi (Amherst College) 1879  
Grand Alpha (1903-07)

# The Fraternity Ideal

To write for such a magazine as this is not easy. One is confronted with the certainty that the subject he has selected is as "old as the hills," to say nothing that at least an hundred times before it has been more ably treated by writers of another day. The writer of this communication disclaims at the outset even the semblance of novelty or originality for the thoughts here presented (a statement which ought to disarm hostile criticism), and only presumes to utter them because the events of recent happening, as he knows them, have impressed their vital importance afresh upon his mind.

The Fraternity has an ideal. It must be *uniform*, else the outcome is confusion; *it must be lived up to*, otherwise it is worse than useless. No individual member (why, then, any one chapter?) has the right to set up an independent ideal. The root idea of a fraternity forbids. Granted the existence of an ideal (and none is higher than that of Chi Phi), it must be our constant aim and endeavor to see that the ideal is lived up to. One of the "old boys" may venture to say a word on this point, as his observation has directed him.

Our idea is that connection with the Fraternity is *for life*. Yet this is in seeming conflict with an existing state of things, viz.: the absence almost generally of the alumni from active participation in the life of our Fraternity. If the writer thought that this were a peculiarity of Chi Phi, he would not give utterance to his views in the *Chakett*, as he is not an advocate of the practice of washing dirty linen in public. All the Greeks are in the same boat, so far as he can see. The great bulk of the alumni are lost to their fraternity after they leave college.

Who is to blame for this state of things? Largely, of course, the alumni themselves, *but not wholly*. The college men ought to bear at least a modicum of the blame. The spirit which makes a college man feel that his undergraduate days mark the bounds of his connection with the Fraternity is fatal to any activity on his part in latter days. There has been, and there is now, too much of that spirit prevalent in college circles. There are, of course, applications of the Fraternity ideal *only possible*

during the associations of college days. But it is a very petty brotherhood which lasts at the most but for four years, and is dependent upon daily contact with the brothers for its continuance. Is there nothing the added experience and improved position of the alumnus can bring to the enrichment of his Fraternity? Is there no way in which the graduate may continue to be a brother in Chi Phi (actively, of course)?

To ask the question is to answer it. How may it be done? Let all the alumni wear their badges. There is no community in which this simple thing will not count for very much. Let the older men keep in touch with the Fraternity by paying for and reading the publications issued by their fraternity. Let them strive to send desirable men to college from which the future material of an A1 fraternity may be drawn; taking the precaution that these candidates have previously been impressed, by what they saw in their graduate friend, that *his* fraternity was *the one* to join, because it was (and had done) so much for him.

Let it be known that the alumni can be counted on to turn out on the occasion of banquets and reunions. In a word, let them do any one of a dozen things which might be named to show some realization of *personal* connection on their part with the Fraternity of their college days. There are happy exceptions among ourselves at least, of those who have worked early and late since leaving college for the welfare of the Fraternity. We confess, however, that the ideal is not realized, when we admit, as we must, that these *are* exceptions. *Our constant effort ought to be, to change the exception into the rule.* Another way to reach this end may be suggested. The present body of undergraduates may do a great deal.

First: They can keep themselves before their own alumni, seeking their aid and advice, to say nothing of reporting from time to time the condition, prospects and plans of the chapter. They can make *special efforts* in the way of invitation and solicitation in the case of those from whom the never hear, or whose presence is unknown by the chapter generally. Has it not often been the case that the college men communicate with and send their invitations mostly, if not solely, to those graduates whom they know or have seen at chapter reunions? If each of the alumni was persistently followed up by his chapter, at least the blame could be placed solely where it belonged; the graduate being left without the old excuse, "It is so long since I have heard about my chapter that I had forgotten I ever belonged to it."

Second: Those now in college may be so impressed with the permanent and abiding character of fraternal obligations that after graduation, as a matter of course, without any urging, they will continue their active interest and work for the Fraternity. Possibly, as some think, the bulk of our alumni (in this respect) are past recovery. I hate to think it. Still, be that as it may. The hope of the present is in the future. Those now in college have a large responsibility resting upon them. If they perform it, each year will witness the closer actual approach of Chi Phi to the highest ideal of a fraternity, where there is no difference in the conditions of the members *save that of degree*; alumni and undergraduates all alike, active fraternity men; each in his place, doing all in his power to advance the common good.

**[Editor's note: all italics and parentheses were made by the original author.]**



# LOOKING FOR A LONG-LOST FRIEND?

The new Chi Phi Fraternity Membership Directory, scheduled for release in June 2003, will be the most up-to-date and complete reference of over 46,000 living and deceased Chi Phi Fraternity members ever compiled! This comprehensive volume will include each brother's name, chapter designation, address and phone number, academic data, plus business information (if applicable), bound into a classic, library-quality edition. Our Membership Directory will also be available as a CD-ROM which will be searchable by chapter affiliation, geographic area, and profession.

All members were recently notified of our upcoming new membership directory and were asked for updates to their membership information. In mid-September, all members with e-mail addresses on file with the national office received an e-mail asking that they update their membership records online. And by now, all members with

current mailing addresses should have also received an important questionnaire in the mail. If you have not already done so, please return your questionnaire today. This will ensure that your personal information will be accurately included in this great new reference book.

Once received, your information will be edited and processed by our publisher, Bernard C. Harris Publishing Company, Inc., for inclusion in our new directory. Harris Publishing is also searching to find our more than 9,000 lost members.

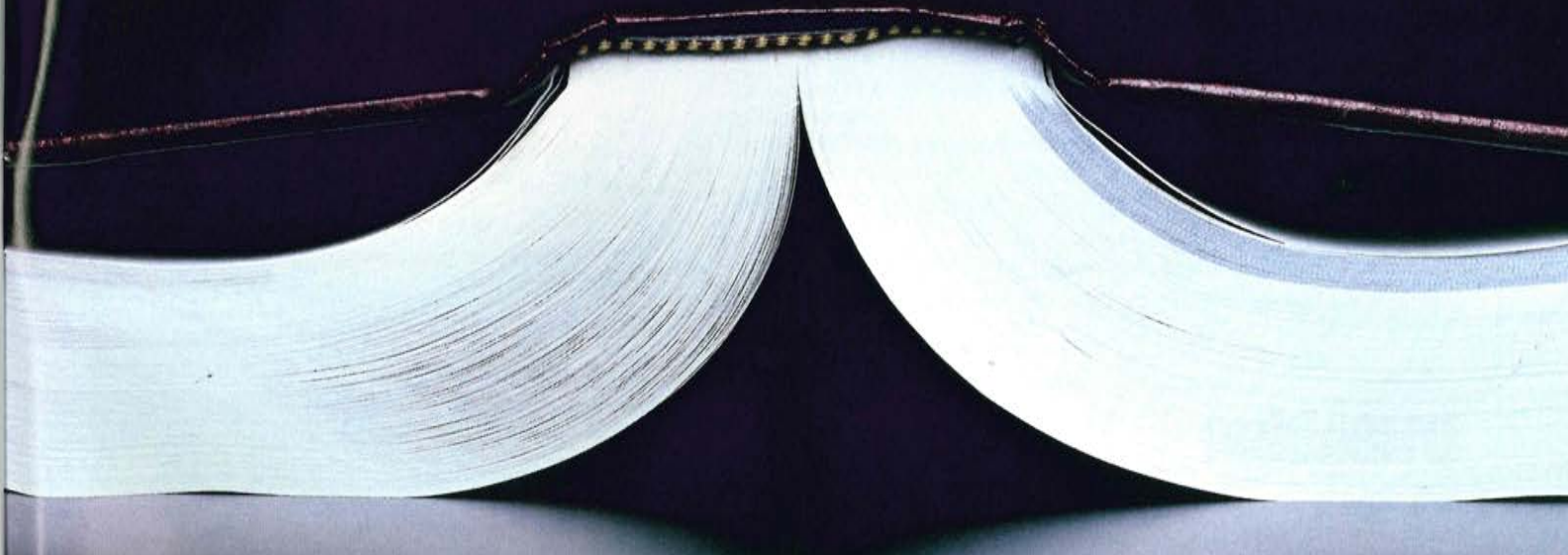
Beginning in December of this year, Harris will contact every member possible by phone to verify that your personal data is absolutely correct. If we have an accurate phone number for you, you will be receiving a telephone call from Harris Publishing. Please give the representative who calls you a few moments of your time to verify your listing.

To reserve your copy of the Chi Phi Fraternity Membership Directory, please advise the Harris representative during this conversation, since this will be the best and easiest opportunity for members to order the book.

Scheduled for release in June 2003, the Chi Phi Fraternity Membership Directory promises to be the definitive reference of over 33,000 of our living alumni. Don't miss the opportunity to be a part of it!

**We don't want to leave anyone out! So don't take a chance...watch for your questionnaire form and remember to return it before the deadline! Then, take Harris Publishing's call when they contact you to verify the information.**

**For assistance with the questionnaire form as well as any other questions, please contact Harris Publishing Customer Service at 1-800-877-6554.**



# Simple & Meaningful

## *Gifts of Retirement Assets*

Alumni and friends of the Chi Phi Educational Trust have found a simple way to make a significant contribution to the future of Chi Phi. The idea is planned giving, maximizing the charitable impact of a gift by carefully considering the multitude of gift options available.

Since the Trust is a qualified 501(c)(3) non-profit organization, many tax-advantaged avenues are available to donors above and beyond outright gifts of cash. Depending on how donors make a gift, they may be able to avoid capital gains tax on appreciated assets; avoid estate tax and gift tax; and/or receive income for life.

This article is the third in the series "Planned Giving: Making the Most of Philanthropy," written with the help and insight of Nedom Haley, Omega 1965. Brother Haley is a partner with the Gambrell & Stolz law firm in Atlanta, Georgia. He specializes in tax law.

This series is designed to provide a general summary of the most common ways to make tax-advantaged gifts to section 501(c)(3) organizations. While this information is intended to provide readers with an overview of options, it is not a substitute for specific advice from a professional.

Wouldn't it be nice to leave a permanent legacy just by filling out a simple form? Hard to believe, but your retirement assets—such as 401(k) plans, IRA's, 403(b) annuities, section 457 plans, and other tax deferred retirement vehicles—give you this opportunity.

When structuring your estate plans, qualified retirement plans like those listed above are especially good candidates to use in making charitable gifts. Otherwise, these types of assets can become subject to heavy taxes levied by the Internal Revenue Service.

It is possible for income and estate taxes to consume over eighty percent (80%) of the value of the retirement account. By naming the Trust as the beneficiary upon death of the account holder, 100% of the value of the account would be transferred to the Trust to be used in accordance with the wishes of the donor.

This holds true only for retirement accounts under which a lump sum distribution is possible on the death of the account holder. It is not feasible in the case of traditional pension plans offering a lifetime annuity.

Probably one of the best things about gifts of retirement assets is that they can be arranged simply by filling out the appropriate beneficiary form provided by the retirement plan's administrator. However, donors should contact the Trust to make their intentions known, especially if they would like their gift to be earmarked for a specific purpose or chapter.

# Ways to Support the Trust

## Are my gifts to the Chi Phi Educational Trust tax-deductible?

Yes, all gifts to the Trust are tax-exempt to the fullest extent allowed by law. The Chi Phi Educational Trust is a 501(c)(3) charitable organization. Our federal tax ID number is 58-6035103.

## Matching Gifts

Did you know you could easily double or even triple your gift to the Trust? Many companies offer to match the charitable gifts of their employees. To find out if your employer has a matching gift program, check with your human resources department. Or you can visit [www.chiphi.org](http://www.chiphi.org) to a review list of matching gift companies.

## Leaving Your Legacy

Bequests and other planned gifts are often a significant source of financial support for charitable organizations. The Chi Phi Educational Trust is no exception. Your gift to the Trust helps ensure the Fraternity's strength and continued success as we educate tomorrow's leaders today. As you create or revise your personal estate plans, please take a moment to remember the valuable life lessons you learned from your Chi Phi experience.

## Making Gifts of Stock

By gifting an appreciated security directly to a charity like the Chi Phi Educational Trust, a donor is eligible for a charitable deduction for the full market value of the stock while paying no capital gains taxes.

When transferring appreciated securities, please notify the Trust of the name and number of shares being transferred in advance of the transaction. We want to make certain that your gift is correctly acknowledged for your tax records and that you receive full credit for your contribution in the Trust's next Annual Report.

Please feel free to share this information with your professional advisors, such as your attorney, CPA, or stockbroker. To learn more about making gifts of stock or to obtain the Trust's brokerage transfer information, please contact Scott Henderson at (404) 231-1824 ext. 23 or via email at [henderson@chiphi.org](mailto:henderson@chiphi.org).

## How to Create an Endowment Fund

Each year, the Trust helps donors create endowment funds that benefit the members of the Chi Phi Fraternity. How does it work?

### Sample Legal Language

I give and bequeath to the Chi Phi Educational Trust, a 501(c)(3) unincorporated trust located at 850 Indian Trail Rd NW, Lilburn, GA 30047, \_\_\_\_\_ percent (\_\_\_\_%) to be used by the Trust in fulfillment of its educational purposes as the Trust's Board of Trustees shall determine.

*This information is intended to be of a general nature. We encourage you to consult with professional advisors concerning your personal situation.*

- A minimum initial gift or pledge of \$5,000 is required to establish such a fund.
- The first educational grant will be awarded once the fund reaches \$5,000.
- The donor may choose to leave the fund unrestricted in use or may stipulate how it will be used. Often, donors choose to restrict their fund for the benefit of a specific chapter or educational program.
- Funds may support a wide variety of educational purposes, including scholarships. Scholarships are generally awarded based on merit, need, and/or leadership.
- Five percent (5%) of the fund's market value will be made available for educational grants each year. As a general rule of thumb, each \$10,000 in the fund will generate \$500 for educational grants.

From the The Grand Council, Trustees,  
and National Staff of the Chi Phi Fraternity  
and Chi Phi Educational Trust



*Happy*  
*Holidays*

**true blue**



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