

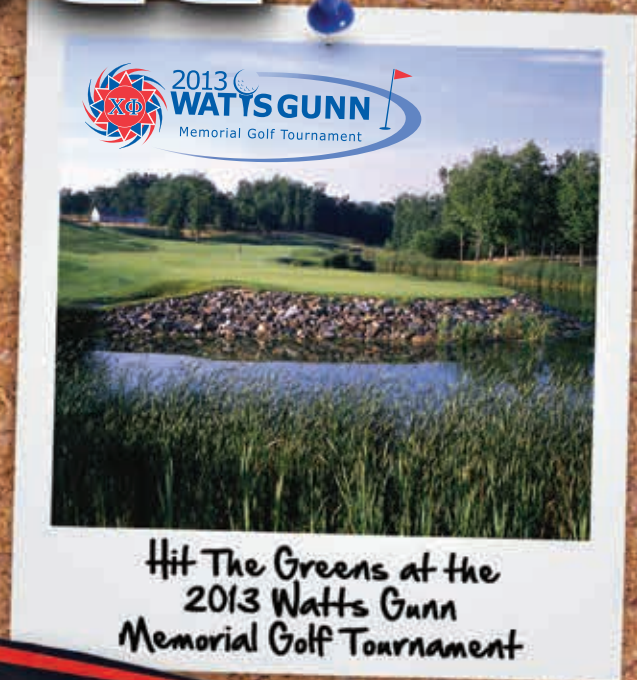
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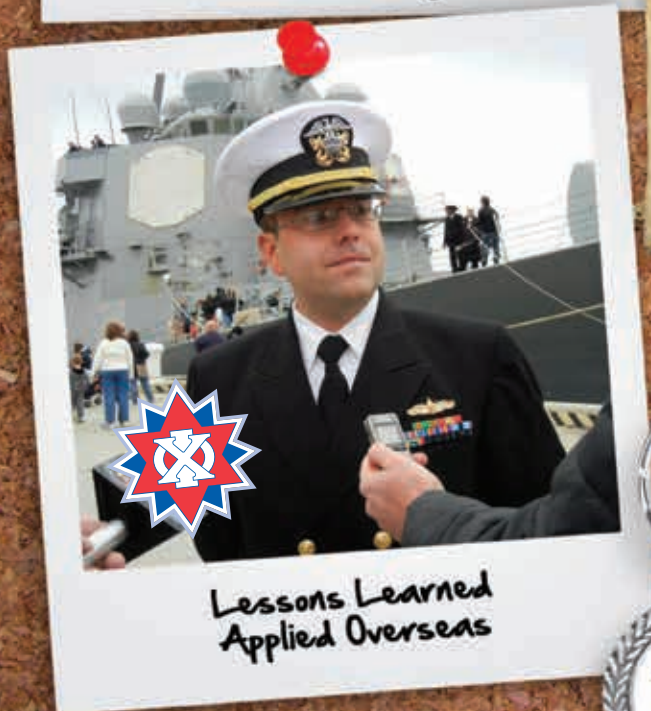
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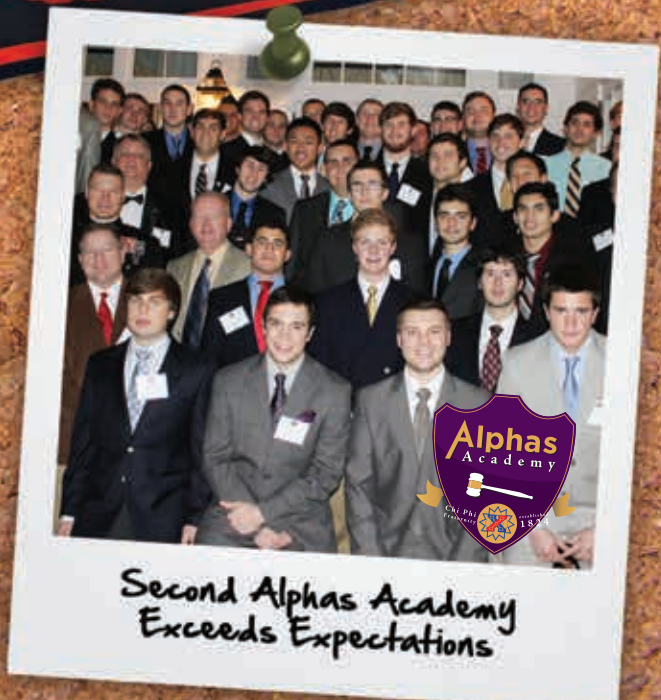
148th Chi Phi Congress
June 27 - 30, 2013
Baltimore, Maryland



Hit The Greens at the
2013 Watts Gunn
Memorial Golf Tournament



Lessons Learned
Applied Overseas



Second Alpha Phi Academy
Exceeds Expectations





UPCOMING DATES

June 27-30, 2013

148th Chi Phi Congress

See page 5 for additional details.



June 27, 2013

The 2013 Watts Gunn Memorial Tournament

will be Thursday, June 27, 2013 at Bulle Rock Golf Course in Havre De Grace, Maryland. *See page 6 for additional information.*



July 24-28, 2013

Chi Phi College of Excellence

Register online at www.chiphi.org/coe
See page 21 for additional details.



State of the Fraternity

David J. Ebner to Leave Staff

On March 8, 2013 David Ebner permanently moved to Florida with his wife to pursue opportunities in creative writing. David joined the staff in 2010 as a Field Executive. After visiting 42 Chapters and Colonies, he was promoted to Senior Field Executive. In Florida, he will continue earning his Master's of Fine Arts in Creative Writing. He will also be working as a freelance writer.

THE CHI PHI **chakett**

First published in 1868

SPRING 2013

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CONTRIBUTORS:

Michael Azarian Psi Delta 1997, *Editor-in-Chief*
 Elizabeth Knott..... Kappa Delta Sorority
 Collin A. Zimmerman Penn College Colony 2010,
 Pi Theta 2012, *Managing Editor*
 Christopher Shuler..... Alpha Zeta 1984

Dr. James Soderquist Alpha 1967
 Deanne Walters..... Zeta Tau Alpha Fraternity
 David Ebner Delta Zeta 2008
 Benjamin Portman Phi Lambda Theta 2007

Chi Phi Fraternity Chi Phi Educational Trust

William M. Byrd Chi Phi National Headquarters
 1160 Satellite Blvd. | Suwanee, GA 30024
 404.231.1824 | 404.237.5090 fax

www.chiphi.org



GRAND COUNCIL

GRAND ALPHA

Dr. James P. Soderquist,
Alpha 1967
Charlottesville, Virginia

GRAND BETA

Ron Frank, Nu Delta 1983,
Iota Zeta 1989,
Delta Zeta 2000
Tampa, Florida

GRAND GAMMA

Frank Uryasz,
Alpha Theta Chi 1983
Kansas City, Missouri

GRAND DELTA

Eric Pittman,
Alpha Zeta 1993
Atlanta, Georgia

GRAND EPSILON

Senour Reed, Eta 1979
Atlanta, Georgia

GRAND ZETA

Steven Hopkins, Nu 1999
Dallas, Texas

GRAND ETA

George MacDonald, Kappa
Delta 1971, Iota Zeta 1989
Arlington, Virginia

GRAND THETA

Clark Kjorlaug, Omega 2012
Atlanta, Georgia

GRAND IOTA

Patrick Moriarty,
Tau Zeta 2013
Boston, Massachusetts

HERITAGE AND TRADITIONS COUNSELOR

Glenn Johnson,
Mu Theta 2004
Lake Jackson, Texas

SCHOLASTIC COUNSELOR

Raymond Carnley,
Delta Pi 2000

MEMBER AT LARGE

Michael Orta,
Phi Lambda Theta 2006
Jacksonville, Florida

MEMBER AT LARGE

Matthew Chiaverini, Psi 2014
Bethlehem, Pennsylvania

MEMBER AT LARGE

Casey Woolf, Phi Delta 2011
Boston, Massachusetts

EXECUTIVE DIRECTOR & EDITOR OF THE CHAKETT

Michael Azarian,
Psi Delta 1997
Suwanee, Georgia

FRATERNITY COMMITTEE CHAIRMEN

ACCREDITATION

Tom Deans,
Phi Lambda Theta 1955

ALUMNI EDUCATION

Ron Frank, Nu Delta 1983,
Iota Zeta 1989,
Delta Zeta 2000

EXPANSION

Michael Orta,
Phi Lambda Theta 2006

FINANCE

Eric Pittman,
Alpha Zeta 1993

HERITAGE & TRADITIONS

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John E. Hutzler,
Kappa Delta 1990

TRUSTEES

Sunny Handa, Xi Delta 1989

Mark Ordesky,
Eta Delta 1985

David Skelton, Omega 1980

LEGAL COUNSEL

George M. MacDonald,
Kappa Delta 1971,
Iota Zeta 1989



Brothers:

Welcome to the second all-electronic edition of the *Chakett*. Since 1868, Chi Phi has published a magazine to connect, inform, and entertain Brothers. In the beginning, it was a collection of reports submitted by individual Chapters. Over time, we have produced our publication as a journal, magazine and newspaper. This edition will be entirely digital.

For the second year, the Fraternity has experienced positive growth! We brought back the College of Excellence, which will be held July 24-28 in Atlanta Georgia. Brothers currently in school should strongly consider applying for the program. Additional details for the College of Excellence can be found on page 21. For the second year of Alphas Academy we increased attendance by 10 participants. This positive growth will help even more Chapter Alphas successfully lead during their terms. A complete recap of the weekend can be found on page 8.

Great progress has been made on improving the physical space of the Greek Life Museum. Located in the William M. Byrd National Headquarters Building in Georgia, visitors can read and view the 145 years of the *Chakett* magazines or explore the treasure trove of historic and educational information. In March, construction crews remodeled the existing space to meet the museum's needs. A dedicated space now exists to display artifacts from Chi Phi's 188 years of existence. If you have old photos, scrapbooks, jewelry or other Chi Phi memorabilia, we encourage you to consider donating them to the Museum. In that way, they can be preserved for posterity and made available for all of our members to enjoy. The Greek Life Museum is open to all interested in Greek Life history. If you ever find yourself in the Atlanta area, consider a visit.

In March, both boards met for a joint Grand Council and Educational Trust meeting. During the weekend board members were able to discuss initiatives to move the Fraternity forward. The weekend started off with local Alumni and board members playing a game at the Savannah Golf Club in Savannah, Georgia.

As we focus on raising the final 21% of our \$10 million *Changing Lives Campaign* goal, we remain steadfast in our commitment to endow these leadership programs so a perpetual source of funding is in place for those Chi Phi leaders 10, 20 even 50 years from now. Those new members will be exploring the newest leadership training challenges and models of their time. If you have ever considered contributing to Chi Phi, but were not certain what to support – select one of our leadership programs listed on our website at: www.chiphicampaign.com/donate and earmark your gift to ongoing leadership training for our Members.

Many great things are occurring in Chi Phi these days. Your feedback and opinions are important to us. We invite you to click on our names below, and send us an email; post a message on our Facebook pages or Tweet at us. The challenge of the electronic age is upon us, and we are committed to exploring every opportunity that will allow us to better serve the Brotherhood.

Faternally,

James P. Soderquist, D.D.S.,
Alpha 1967
Grand Alpha

Christopher J. Shuler,
Alpha Zeta 1984
Educational Trust Chairman

148th Chi Phi Congress



Hosted In

Baltimore, Maryland

Dates

June 27 - 30, 2013

Attire

Congressional sessions, banquets, and activities are business attire (coat and tie) events.

Join America's first College social Fraternity for the 148th iteration of its convention! This summer, Chi Phi Brothers and friends will gather in Baltimore during June 27-30, 2013.

During the four-day event, official Congressional delegates debate policy, enact legislation and set the 2013-14 Chi Phi budget. The annual convention also provides an opportunity to recognize the 2012-13 undergraduate and Chapter award winners. The Fraternity will recognize and honor the 2013 Walter Leland Cronkite Jr. Chi Phi Congressional Award winner during the closing, black tie optional banquet on Saturday evening. A variety of educational sessions and special programs are also scheduled.

Alumni, students and friends can learn more and register for Congress by visiting www.chiphi.org/congress

SCHEDULE OF EVENTS

Thursday, June 27

7:00 a.m.

Watts Gunn Memorial Golf Tournament - Registration and Putting Greens Open

8:30 a.m.

Shot-gun start to the golf tournament

7:00 p.m.

Chi Phi Educational Trust Leadership Dinner and Golf Awards Ceremony (invitation only)

Friday, June 28

8:30 a.m.

Alumni Breakfast

9:00 a.m.

Pre-Congress Education Sessions

Dinner and Game

Baltimore Orioles v. New York Yankees

Saturday, June 29

Noon

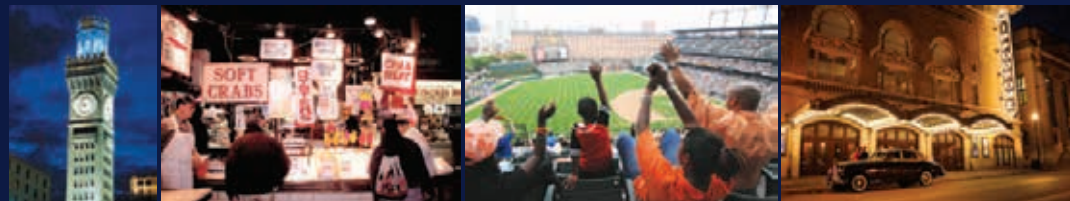
Awards Luncheon

7:00 p.m.

Cocktail Reception

8:30 p.m.

Congressional Banquet recognizing Cronkite Award Winner 2013



Watts Gunn XΦ



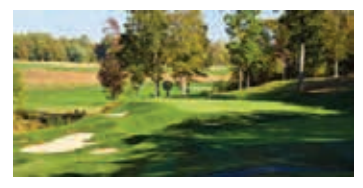
2013 WATTS GUNN

Memorial Golf Tournament



Hit the greens with Chi Phi and help support Chi Phi Leadership Development Programs at the Watts Gunn Memorial Golf Tournament! The 2013 Watts Gunn Memorial Tournament will be Thursday, June 27, 2013 at Bulle Rock Golf Course in Havre De Grace, Maryland. Named after the first thoroughbred horse brought to America, the name Bulle Rock truly signifies the strength of the 235 acres of golf heaven. It is continually ranked in the Top 100 listings of every major golf publication.

The Watts Gunn Memorial Golf Tournament is an opportunity for corporations and individuals to support Chi Phi Leadership Development Programs and have some fun along the way. The tournament honors internationally famous Chi Phi golfer, Watts Gunn, Omega 1928 better known as "the Southern Hurricane." Held the day before Congress, the scramble-style tournament has raised \$64,000 to support the College of Excellence and other leadership development programs benefiting Chi Phi students across the country.



JUNE 27, 2013



BULLE ROCK GOLF COURSE
HAVRE DE GRACE, MARYLAND



SCHEDULE OF EVENTS:

JUNE 27, 2013

7:00 a.m..... Driving range and putting greens open
7:30 a.m..... Registration and Breakfast begin
8:30 a.m..... Shot-gun start
7:00 p.m..... Chi Phi Educational Trust Annual Leadership
Dinner and Golf Awards Ceremony

Tournament Information:

- > Four person team scramble format
- > Individual Player Cost \$250
(includes breakfast, greens fees and cart fees)
- > Tournament Contests include closest to the pin
and longest drive
- > Mulligan Tickets Available

Registration Deadline June 10, 2013

Sponsorship Deadline June 5, 2013



REGISTRATION FORM

I would like to support the Watts Gunn Memorial Golf Tournament and Chi Phi Educational Trust in the following way:

- Presenting Sponsor - \$10,000
- Gold Sponsor - \$5,000
- Silver Sponsor - \$2,500
- Hole/Green Sponsor - \$1,000
- Individual Player - \$250

Player 1 *(Team Captain)*: _____

Player 1 *email and phone*: _____

Player 2: _____

Player 3: _____

Player 4: _____

Sponsoring Company Name: _____

Sponsorship Contact Name: _____

Phone: _____

Email: _____

Website: _____

PAYMENT INFORMATION:

- I have enclosed a check - made payable
to Chi Phi Educational Trust
- Please invoice me
- Please charge my credit card



Card Number _____

Name on Card _____

Expiration Date _____ Billing Zip Code _____

Signature _____

Return this form to the Chi Phi Gift Fulfillment Office
P.O. Box 2187, Columbus, GA 31902 or register online
at www.chiphi.org/golf

Please note all donations to the Chi Phi Educational Trust and the Watts Gunn Memorial Golf Tournament are tax deductible except for the cost of the tournament to the extent permitted by law.

758 - 123 - 201311GT

Visit www.chiphi.org/golf to register.





Second Alphas Academy Exceeds Expectations

In January, thirty-eight Chapter Alphas from across the country traveled to Atlanta for Chi Phi's second annual Alphas Academy, a program designed specifically to prepare newly elected Chapter Alphas for their term in office. The program curriculum is based around Kouzes and Posner's leadership theory called "The Leadership Challenge" which outlines five key behavior categories leaders use to lead an organization. The Chapter Alphas assessed their strengths and learned how to improve their weaknesses in order to better lead their Chapter. They also delved into each behavior category to better understand how to use those behaviors to benefit their chapter. The weekend culminated in each Alpha developing a leadership plan for their term in office.

Saturday activities of Alphas Academy were once again the highlight of the experience for participants. The afternoon started with Chi Phi Alumni sharing their wisdom and helping Alphas understand that the challenges they will encounter throughout their terms are lessons that will also help them be successful in their careers after college. Four distinguished Alumni provided insight about their career success and how membership in Chi Phi has played a role in their success. Saturday evening, Trust Chairman Christopher J. Shuler, Alpha Zeta 1984, treated Chapter Alphas to a formal dinner at

Sugarloaf Country Club. The evening concluded with Col. Dale Alford, Alpha Zeta 1986 sharing lessons learned about leadership through his time in the US Marine Corps. He laid out specific actions Chapter Alphas need to take in order to be successful leaders within their Chapters and throughout their lives.

New to this year's Academy was the addition of student facilitators, graduates of the inaugural Alphas Academy program, who aided in the implementation of the Academy. Student facilitators were an invaluable addition to Chi Phi's second Alphas Academy. It is always beneficial to have the opportunity to talk with people who have been in your position and have been successful. Student facilitator, Lucas Da Pieve, Phi Delta 2013, reflected on his experience by stating, "After a second tour of Alphas Academy I am even more inclined to recommend this program to every Chapter Alpha, and I hope we can find funding for this program every year!" He went on to say that after revisiting the Alphas Academy experience as a student facilitator he was able to reflect on how he could have handled situations differently during his term in office.



Alumni Participate in the ALPHAS ACADEMY



Most view the Alphas Academy as a student weekend, but without Alumni, this great event could not happen. From making gifts to supporting the program, to hosting and facilitating discussions, Alumni are key ingredients in a successful Academy.

During the 2013 Academy one Alumnus, Brother Jim Hartsel, Rho 1962 was recognized for his special commitment to the Academy. Brother Hartsel made a generous gift to establish the David Walsh Fund for Undergraduate Leadership, which will provide scholarships for Brothers to attend the Alphas Academy. The first fund dedicated to Alphas Academy scholarships, it will honor the memory of Rho Chapter Brother Dave Walsh who was killed in action during the Vietnam War. Brother Walsh, like so many Brothers that will attend the Alphas Academy, was a natural leader and earned the Distinguished Service Cross for extraordinary heroism in action.

Alphas also had the opportunity to hear from Jim Wimberly, Eta 1965; Ken Fredericks, Theta Delta 1980; Dave Skelton, Omega 1980 and Brian Otott, Alpha Zeta 1989 on the Taking Leadership from the Chapter Room to the Board Room Alumni panel. Brother Otott shared that Alphas must model the behavior they want to see from their Chapter. "People will be looking to you, the Alpha, to walk the walk. Showing your core values in your actions will help your Brothers understand what is expected of them."

Brother Fredericks, who spent 20 years leading the Human Resource divisions of major corporations, shared that the most important lesson he learned from Chi Phi and his career is that picking the right people is the key to success.

"Selecting the right Brothers to join the Chapter, the right Brothers to chair a program or serve as an officer is no different than how a corporation works to select the right employees. Don't be afraid to pick the right people."

— Ken Fredericks, Theta Delta 1980

To learn more about how you can support or participate in the 2014 Alphas Academy contact Director of Development, **Elizabeth Knott** at 404.231.1824 or knott@chiphi.org.



The weekend wrapped up with the Chairman's Dinner hosted by Trust Chairman Chris Shuler, Alpha Zeta 1984. Col. J. Dale Alford, USMC, Alpha Zeta 1986 addressed a crowd of nearly 100 including Chapter Alphas, Alumni and guests. Col. Alford, one of the most highly decorated Marines serving today, shared with the Alphas, "Don't be threatened by disagreements. It will take time, but if you are honest and consistent, your Brothers will learn to tell you, the Emperor, you have on no clothes. You want that." He also went on to say, "Be transparent. Make your decisions in open forums. It's never about you. It's about the Fraternity, it's about your Brothers, and it's about the success of your Chapter."

2013 Alphas Academy Graduates

| | |
|--|---|
| Benjamin Anonick, Alpha-Tau 2015 | Panagiotis Kanellakopoulos, Gamma 2014 |
| Michael Barbalace, Alpha Delta 2014 | Ryan Kirchoffer, Delta Zeta 2014 |
| Bradley Bartel, Kappa 2015 | James Koy, Theta Zeta 2013 |
| Zachery Bearden, Alpha Zeta 2014 | Sean Kuo, Eta Theta 2014 |
| Morgan Bellin, Tau 2014 | Nicholas Laferriere, Theta 2015 |
| Matthew Blanton, Phi Delta 2014 | Patrick Lee, Psi 2013 |
| Edward Bowden, Epsilon 2014 | John Malone, Xi Delta 2014 |
| William Brown, Iota 2015 | John Mandy, Zeta 2014 |
| Joseph Costa, Lambda Theta 2014 | Ross Masters, Alpha-Alpha 2014 |
| Lucas Da Pieve, Phi Delta 2013 | Nicholas McAndrew, Psi Delta 2012 |
| John DeYonker, Eta 2014 | Adam Pannier Pi Theta 2013 |
| Nicholas Escalante, Omicron Theta 2014 | Nicholas Perez, Xi 2014 |
| Gregory Esposito, Kappa Delta 2014 | Jason Raia, Omega Zeta 2014 |
| Davis Gallinghouse, Phi Lambda Theta 2014 | Gabriel Rosenbrien, Psi 2014 |
| Austin Garcia, Delta Pi 2013 | Graham Steele, Epsilon Delta 2015 |
| Nickolas Garson, Nu Delta 2014 | Lukas Strasser, Rho Delta 2013 |
| Pablo Gonzalez, Lambda Zeta 2014 | Christian Syavongsay, Alpha Theta Chi 2014 |
| Jeffrey Greenhouse, Theta Delta 2014 | Travis Weaver, Psi Zeta 2013 |
| Michael Gustin, Tau Zeta 2014 | Kristopher Yingling, Nu 2013 |
| Steven Howard, Omega 2014 | |

Lessons Learned Applied Overseas

By: David Ebner, *Delta Zeta 2008*

Most have already forgotten the events that took place on August 12, 2012. Brother Shaun Geary, Delta Zeta 2009, awoke that morning abruptly when his body fell to the ground. Immediately he knew that something was wrong, his room started to pitch, 27 degrees to be exact, but he did not wait to see if it would right itself. He exited and promptly made it to his battle station, Damage Control Central. At that time, he knew few things about what caused him to be rocked from his rack and wake up on the deck, he knew that his ship had collided with something, that there was visible damage to the exterior of the vessel and that it was his job to fix it.

Brother Geary, formally known as Lieutenant Junior Grade Shaun Geary, the Damage Control Assistant aboard the USS Porter. Shaun commissioned as an officer in the U.S. Navy in December of 2009, after graduating from the Naval ROTC program at the University of South Florida. Along the way, he received a scholarship to the Naval Reserve Officers Training Corps program at University of South Florida. During the 2005 fall semester, Shaun joined the Chi Phi Fraternity. He served the Fraternity as the Chapter Beta, Delta, New Member Educator, and Alumni Relations Chairman. In 2007, after a Membership review that left Delta Zeta with eight Brothers, he took over as Alpha.

When asked if he had an attraction to disastrous situations, Brother Geary replied, "I usually find myself in the wrong place, at the right time. I enjoy a challenge. I think that as long as there is something to believe in, it deserves sharing, and it deserves showing."

On August 12th Shaun was not thinking about a social with the sorority across the street or a Brotherhood camp-out, his thoughts ran to his training. "I had just completed a seven week school to become the Damage Assistant, where we ran plenty of scenarios... we train for that scenario that we hope never happens, but sometimes it does." Shaun continued, "It's not like we run drills for what you do if you're hit by another ship... we take the lessons of the USS Samuel B. Roberts, back in the early nineties was struck by a mine, USS Stark was hit by a missile, and of course the USS Cole was hit by suicide bombers. We take those lessons learned and we drill scenarios out of them."



After it was struck by the Japanese-owned oil tanker, the USS Porter did take on water and flood; luckily, the flooding was internal from pipes rupturing from the stress of the impact. All the damage to the exterior of the ship was above the waterline. Brother Geary could not attest to the exact amount of water that was expelled onto the ship, except to say that it was "rapid." The ship made way to Jebel Ali port in Dubai, a trip that took most of the day. It took the crew only two hours to compartmentalize the flooding on the ship, a great response time for a crew that just suffered a collision with a ship packing a 160,000 ton punch.

Brother Geary believes that some of the lessons he learned as an officer in his Chi Phi Chapter have directly assisted him as an officer in the U.S. Navy. "I tell people a lot that working with my peers in leadership positions in the Chapter, and making decisions for the betterment of the Chapter regardless of whether your peers were fans of that decision, was a unique challenge. When I graduated and got out into the fleet, I found myself in a leadership position where I had people older than me that I managed. I had to make decisions for the group and for the betterment of the Navy and the ship. That was the biggest takeaway that I had from being in the Fraternity."

In all, it took seven hard weeks and over \$700,000 to repair the USS Porter to a condition that would allow it to make the long trip home with the USS Enterprise Carrier Strike Group. An endeavor that the U.S. Navy noted as the most extensive voyage repair in Navy History. The USS Porter and Brother Shaun Geary arrived home in Norfolk on November 4th of 2012 after a seven month deployment.

His most recent trip on the USS Porter was Shaun's third deployment in as many years, since his graduation in December of 2009 he has spent 24 of his 36 months as a commissioned officer on deployment. Shaun reported to his first ship, USS Massa Verde and was deployed a few weeks later to Haiti to help with the earthquake relief efforts in January of 2010. From there, he continued on a seven-month deployment to the Middle East before returning in August of 2010. He deployed again on the same ship with less than two weeks' notice in March 2011 to return home in January of 2012. He was able to leave the ship early to get married on January 27 in Fort Lauderdale, Florida. In March 2012, Shaun detached from his command on the USS Mesa Verde to attend Damage Control School. He then flew out to meet his new ship, the USS Porter in May 2012, where he is currently stationed.

It is an above average rate of deployment to shore-duty for a newly commissioned officer, but it is certainly not an above average rate for a man who seems to always be in the "wrong place at the right time."

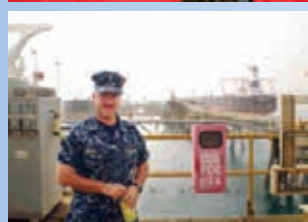
Brother Geary had this message for all the Chi Phis in a ROTC Program across the country, *"Challengers to a junior officer in any branch of the military are going to be universal, you are going to deal with personnel issues. You need to take care of your people. You really have to take the meaning of leadership to a new level. You will have to understand what it means to be responsible and accountable for something. For those Brothers who are in ROTC right now, just knowing how to balance life, Brotherhood and ROTC in itself is a challenge. Unfortunately, it does not get easier. Once you get out to whatever branch you're going to serve in, it just kind of picks up from there. Whether you deploy right away or stay stateside, you are going to have people serving under you and missions to accomplish. You're probably already on the right track, so keep your head up, get ready to work some long hours, keep a positive mental attitude and it will save you in the long run."*



Lieutenant Junior Grade Shaun M. Geary, United States Navy

A native of Mundelein, Illinois, Lieutenant Junior Grade Geary graduated from the University of South Florida in 2009 with a bachelor's degree in Geography.

Lieutenant Junior Grade Geary's first sea assignment was aboard USS MESA VERDE (LPD 19) where he served as the Second Division Officer and Auxiliaries Officer. While on MESA VERDE, he participated in Operation Unified Response, humanitarian aid and disaster relief efforts in Haiti, and deployed to the Horn of Africa and Persian Gulf in support of Commander Task Force 150 and 151 in 2010. In 2011 he deployed in support of Operation Unified Protector, liberation of Libya, and Operation Enduring Freedom. In May 2012, he reported to USS PORTER (DDG 78) currently serves as the ship's Damage Control Assistant. During his tour, he completed a deployment with ENTERPRISE Carrier Strike Group, conducting patrols in support of Operation Active Endeavour and Operation Enduring Freedom.



Lieutenant Junior Grade Geary's personal awards include the Navy and Marine Corps Achievement Medal (2 Awards) and multiple unit and service awards.



CHI PHI MARCH MANIA CHALLENGE



March Mania Excitement Captivates Chi Phi

Sixty-eight college basketball teams took to the court in March for their chance to make history in NCAA March Madness. Long time rivals went head-to-head. Cinderella teams dreamed of cutting down the nets. Everyone put in their all for honor, for glory, for being crowned the best in the nation! In the end there was only one winner for the NCAA tournament, but unlike the NCAA Chi Phi crowned three winners across four categories in the Chi Phi March Mania Challenge.

Chapters went head-to-head fighting to win glory and honor and to make Chi Phi history. More importantly, everyone was working to raise money to support Chapters, educational programs and scholarships for Chi Phi Brothers. Chapters scored one point for every dollar donated by students and alumni. At the end of March, the Chapters with the most points scored by alumni, the most points scored by students, the most alumni participating and the most students participating would walk away winners.

The month started off hotly contested. Rho Delta went up against Theta Zeta and after cruising to a victory Rho Delta faced perennial powerhouse Beta. Just like Florida Gulf Coast University in the NCAA tournament, Rho Delta pulled off a big victory advancing all the way to the final four. Theta Delta made an easy run to the elite eight where they faced Delta Zeta. Delta Zeta actives hit the phones

and called alumni asking them to help score points. After a battle, Delta Zeta engaged more alumni than any other Chapter but Theta Delta was able to bank more points from alumni. Theta Delta would go on to face Eta in the final four and advance to the Championship where they met up with Cinderella story, Lambda Theta.

In the end, Lambda Theta was able to sweep the student participation and points scored by students categories. Theta Delta hung on to win the most points scored by alumni, but Delta Zeta won the alumni participation category.

These Chapters continued the Chi Phi winning tradition. Over the past two years, Chi Phi has been winning big! We have added seven chapters to our rolls. We have brought back the College of Excellence and added the Alphas Academy to train chapter presidents. Chapters are performing at the highest levels we have ever seen. All of this is because of generous donations from Alumni, actives, parents and friends.

Through the March Mania Challenge \$24,293 was donated to support Chapter Excellence Funds and Chi Phi Scholarships. While Theta Delta, Lambda Theta and Delta Zeta will walk away with trophies, every Chi Phi Brother and Chapter benefited from March Mania.

2013 CHI PHI MARCH MANIA CHALLENGE



FINAL

Theta Delta

2013

Lambda Theta

CHI PHI CHAMPION

7 Steps to Achieving Your Retirement Goals

Courtesy of:Benjamin Portman with Vantage Wealth Management at Morgan Stanley
Branch:Morgan Stanley Atlanta Perimeter Branch
Phone:404.459.3847
Email:Benjamin.S.Portman@ms.com



In these days of market volatility and tax uncertainty, you need to make sure you are doing all you can to make the most of your retirement savings. Here are seven actions to take to maximize your retirement strategy.

1 Contribute to an IRA to Maximize Your Savings

A key way to build your retirement savings is to contribute to an IRA. The maximum contribution is \$5,000—or \$6,000 if you are age 50 or older.

The advantages of contributing to an IRA include:

- Earnings with tax-deferred growth potential
- Potentially tax-deductible contributions (subject to IRS eligibility rules)
- Access to a wide array of investment options

2 Set Up Automatic Contributions for Investing Ease

There is no chance you will forget to make a contribution when it's done automatically for you. If your financial institution offers a funds transfer service, you can set up an automatic IRA contribution schedule through electronic transfers from your other financial accounts.

If your current financial institution does not offer this service, you might want to investigate one that does. Typically, you can either set up a one-time transfer, or establish a recurring schedule to make your IRA contributions over time. Once you specify the dates and amounts, your funds will transfer as scheduled.

3 Diversify Your Savings to Better Manage Taxes in Retirement

No one knows what the tax future holds. Diversifying your retirement assets among tax-free, tax-deferred, and taxable accounts may help you reduce your exposure to future tax increases and provide greater flexibility for managing your income stream in retirement.

If you only have tax-deferred 401(k) or Traditional IRA assets, you may want to consider making contributions to a Roth IRA, or converting Traditional IRA or 401(k) assets to Roth IRAs or Roth 401(k)s (if your plan permits), to create a source of tax-free income in retirement.

If your income is too high to make Roth contributions, you can still make non-deductible contributions to a Traditional IRA (and, if it makes sense for you, subsequently convert those amounts into a Roth IRA) while continuing to build your savings.

4 Invest in a Roth IRA for a Tax-Free Future

If you are someone who feels strongly that you will remain in a high tax bracket in retirement and that taxes will inevitably go up, consider putting more of your savings into a Roth IRA and benefit from tax-free income in retirement.

Roth IRA assets will one day provide either tax-free income to you in retirement or a tax-free inheritance for your beneficiaries.¹ A Roth IRA also offers additional advantages:

- **Income planning flexibility**—With a Traditional IRA, at age 70½ you must stop contributing and begin taking minimum distributions—even if you are still earning income. With a Roth, however, there is no contribution cutoff, provided income requirements are met, and no rule about when you must begin tapping into the account. Roth assets have the potential to grow as long as you want, allowing you to make—or forgo—withdrawals as needed.
- **Wealth transfer advantages**—If the assets in your IRA are not needed to fund your retirement, a Roth IRA can be an effective wealth-planning tool for beneficiaries. They can enjoy continued asset growth potential and will not have to pay taxes when they withdraw the assets.

Due to income limitations, not everyone can contribute to a Roth. However, anyone can convert to a Roth—so if you have savings in a Traditional IRA or an employer plan, consider converting all or a portion of those assets.

To help you understand how a Roth conversion will likely affect your financial scenario, I can provide a customized Roth Conversion Analysis for you. This report explores your specific situation, factoring in such variables as the amount to be converted, the distribution year, your date of birth and where you are in the retirement planning cycle. Based on this input, the report shows the after-tax future value of an IRA balance, comparing the outcomes of a Traditional IRA with those of a Roth IRA. You will also be able to see the wealth planning advantages of “stretching” a Roth IRA. As with all tax-related issues, you should also discuss your situation with your tax advisor.



5 Review Your Beneficiaries for Smooth Wealth Transfer

If your life has undergone any changes that could influence who inherits your retirement savings, now is a good time to conduct a beneficiary review of all of your accounts to make sure the savings you're building now will be transferred according to your wishes.

Remember that beneficiary designations on an IRA or qualified plan account always supersede what may be in your will; also, if you converted an account into a Roth IRA, your beneficiary designations may not have carried over. Check with your financial institutions to make sure your beneficiary information is correct and current.

6 Rebalance for Asset Allocation Alignment

Your overall investment strategy helps dictate your asset allocation strategy. Markets change and investments shift in value. To prevent inadvertently taking on more (or less) risk than you are prepared to, your retirement savings should not be weighted too heavily in any direction. Remain within your risk tolerance by rebalancing your retirement asset allocation so it is properly aligned with your investment strategy.

7 Consider Consolidating Accounts for Greater Control Over Investment Direction

If you are like most people, you have retirement savings scattered among several different financial institutions and several different kinds of accounts. That means your retirement money may not be working as efficiently for you as it could be. This is especially the case if you have money sitting in former employers' 401(k) accounts that are experiencing underwhelming performance or are not aligned with your current retirement strategy.

One retirement account with different investment vehicles working together is much easier to keep track of than several disparate accounts. Plus, consolidating all of your retirement savings in one place—and into IRAs that provide a wide variety of investment options—lends you greater control over how your money is working for your future. It's especially important to consider consolidating retirement accounts if you've recently changed jobs or if your employer has merged with another company or gone out of business.

I can review all of your assets with you and help you develop a retirement strategy specific to your needs. That way, your retirement savings can work in tandem with your retirement strategy.

¹ Distributions of earnings are tax-free if made at least five years after the year of the taxpayer's first Roth IRA contribution and after age 59½ or due to death, disability or for a first-time home purchase. Withdrawals of contributions are not taxed. If you already have a Traditional IRA with pretax dollars (i.e., deductible contributions, rollovers from qualified plans), you should consult with your tax advisor about the aggregation rules that will apply if you convert any Traditional IRA assets to a Roth IRA. Articles are published for general informational purposes and are not an offer or a solicitation to sell or buy any securities or commodities. Any particular investment should be analyzed based on its terms and risks as they relate to your specific circumstances and objectives. Asset Allocation, diversification and rebalancing do not assure a profit or protect against loss in declining financial markets. There may be a potential tax implication with a rebalancing strategy. Please consult your tax advisor before implementing such a strategy. Tax laws are complex and subject to change. Morgan Stanley Smith Barney LLC ("Morgan Stanley"), its affiliates and Morgan Stanley Financial Advisors and Private Wealth Advisors do not provide tax or legal advice and are not "fiduciaries" (under the Internal Revenue Code or otherwise) with respect to the services or activities described herein except as otherwise agreed to in writing by Morgan Stanley. This material was not intended or written to be used for the purpose of avoiding tax penalties that may be imposed on the taxpayer. Individuals are encouraged to consult their tax and legal advisors regarding any potential tax and related consequences of any investments made under such account. Article by Morgan Stanley Smith Barney LLC. Courtesy of your Morgan Stanley Financial Advisor. © 2012 Morgan Stanley Smith Barney LLC. Member SIPC. CRC487602 (04/12) 10/12
CRC 487602 04/12

Tax Law Changes Impact Charitable Giving

The American Taxpayer Relief Act of 2012, signed into law by President Obama on January 2, 2013, impacts a wide variety of valuable tax breaks and includes tax provisions affecting individuals and businesses. Key highlights of the new law and their impact on charitable giving are below.

Special IRA Giving Extended Through 2013

When it comes to charitable giving, individuals can continue to make direct contributions from their IRA to qualified charities (like the Chi Phi Educational Trust) of up to \$100,000 and exclude the IRA distribution from their income. This special provision is only in effect until the end of 2013.

Top Estate Tax Rate Increases to 40%

The federal government increased the estate tax exemption to \$5 million, and set the top estate tax payment rate at 40%. This basically means that individuals, who have more than \$5 million in their gross estate upon death, may be required to pay as much as 40% of the value above \$5 million to the federal government. Careful estate planning techniques can reduce your tax burden and fund important charitable causes like a scholarship endowment for a Chi Phi student or your Chapter's Chapter Excellence Fund.

To Learn More

To learn more about how you might employ any of these ideas to your advantage contact Director of Development **Elizabeth Knott** at 404.231.1824 or knott@chphi.org.

XΦΦ — CHI PHI — Census



3,994 likes

facebook.com/ChiPhiFraternity



857 followers

twitter.com/chiphinational



270 people

foursquare.com/chiphinational



3,295 people

<http://goo.gl/m0wUA>



53+

google.com/+chiphil



17,529 visits,
(9,907 unique visitors)

chiphil.org (from Aug, '12 - Dec, '12)



Average
Chapter size: **42**

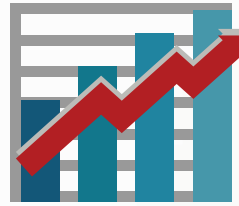
Ever-Joined
Chi Phi:

57,208





2,317* Initiated members



987*

New members

45,254

Living Alumni:



55

Total Chapters and Colonies:



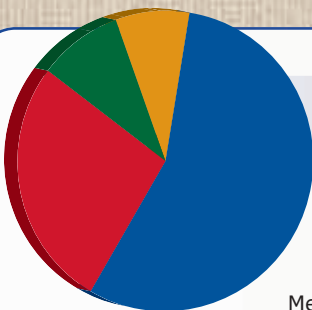
Newly started or Restarted Chapters:

19 (since 2008)

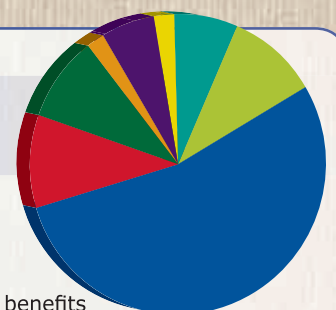
767



Between January 1 and February 28 staff have logged 767 hours on Educational Programs including Accreditation, Chapter visits, and Alphas Academy.



CHI PHI REVENUE & EXPENSES



REVENUE

- Membership dues and fees **56%**
- Chi Phi Educational Trust income **27%**
- Other income **9%**
- Congress **8%**

EXPENSES

- Employee Salaries and benefits **54%**
- Office Operations **10%**
- Member Services **10%**
- Publication of *Chakett* **2%**
- Other Expenses **7%**
- Jewelry and Certifications **2%**
- Alumni Services **6%**
- Congress and Grand Council **9%**

From FY2012

From FY2012

As of 3/31/2013. *Based on Billings.



— CHI PHI —

Chi Phi Educational Trust by the Numbers

\$0.77

- of every dollar donated to Chi Phi was used for educational

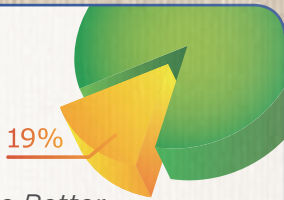
programs and scholarships in 2011-2012. The Better Business Bureau Wise Giving Alliance recommends charities spend \$0.65 of every dollar on program services.

\$1,371,424

- was granted to students in 2011-12 by the Chi Phi Educational Trust for scholarships, educational programs and educational space in Chapter houses.

19%

- percentage of fraternity and sorority foundations meeting the Better Business Bureau Wise Giving Alliance's recommendation to spend 65% of every dollar on program services.



\$0.11



- the cost to Chi Phi Educational Trust to raise one dollar. The Trust worked to cut this number from \$0.20 the previous year and to exceed the BBB Wise Giving Alliance recommendation of \$0.35.

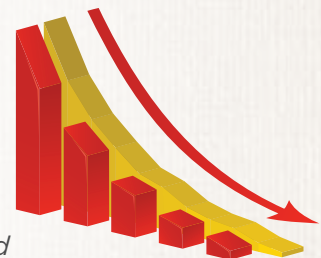
1,600

- donations made to support Chi Phi Brothers and Chapters in 2011-12.



50%

- the amount the Trust was able to reduce spending on management and general expenses from 2011 to 2012. The Trust is focused on spending donor's dollars on educational programs, scholarships and educational space in houses not on management and fundraising.





121

- scholarships awarded to Chi Phi Brothers for undergraduate and graduate education in 2011-12.

9,000

- square feet of educational space built in Chi Phi Chapter houses in 2011-12 through grants from the Educational Trust and Chapter Excellence Funds.

483



- students received scholarships or grants to attend a Chi Phi educational program such as the Regional Leadership Alliance, Alphas Academy, UIFI and more.

64



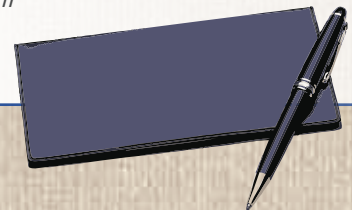
- Chapter and Colony visits conducted by National Fraternity Staff and funded by the Trust.

2,195

- students who had their lives changed by the generosity of Chi Phi donors and investors.

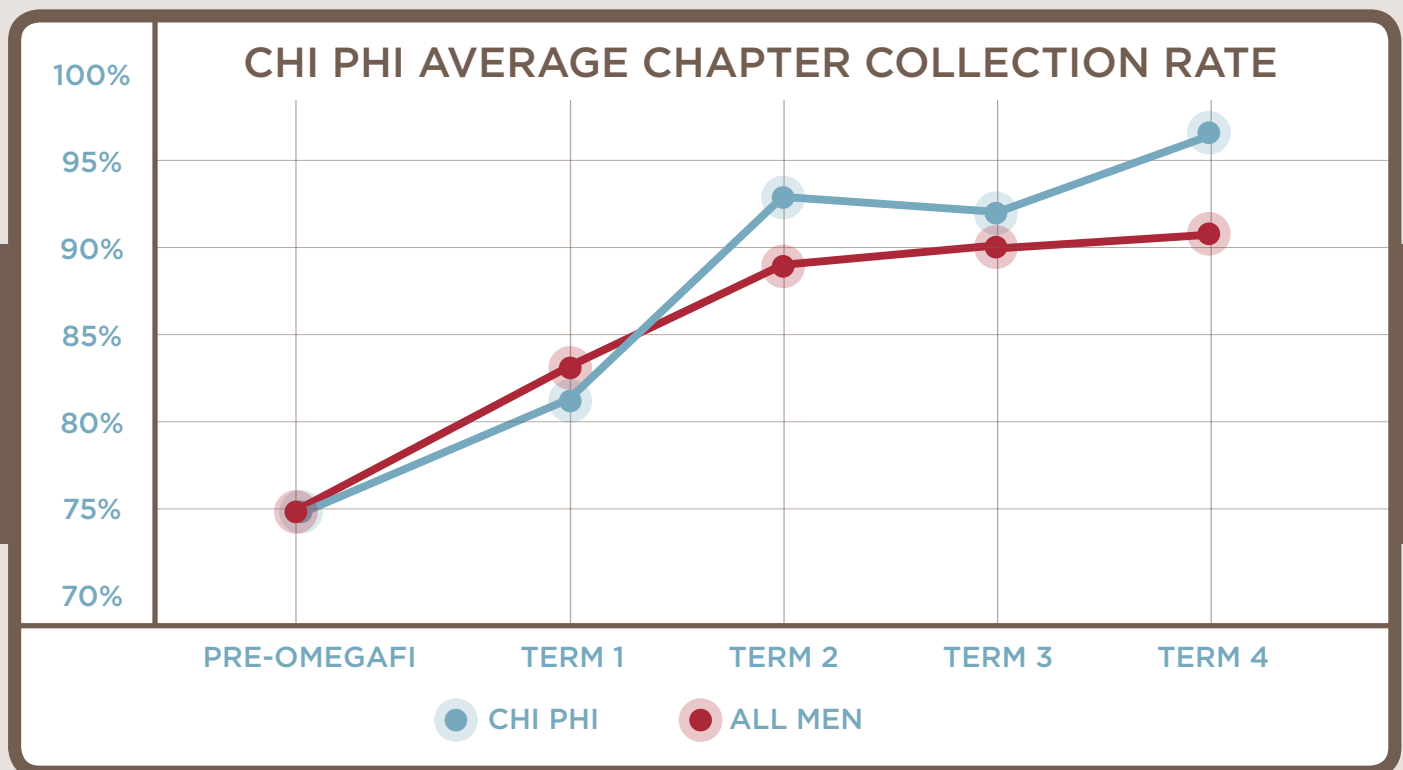
\$1,409

- the average gift made to Chi Phi in 2011-12.



VaultSM *So your chapter can do more.*

Today, almost 30% of Chi Phi's undergraduate chapters partner with OmegaFi for financial, membership management and communication tools through Vault Billing and Collections. These chapters enjoy an overall collection rate of 98.99%, have had over \$855,500 collected on their behalf this year and have tools that help them manage member communications and schedule chapter events efficiently and effectively.



BENEFITS INCLUDE:

- A dedicated and knowledgeable OmegaFi Account Manager who works closely with chapter & alumni leadership to help with all aspects of billing and collections and membership management.
- Improved cash flow for your chapter.
- Mass texting and other communication and scheduling tools.
- **YOU** maintain control, determining who has access to your information, when charges will be assessed and where money will be deposited.

To learn more, contact an OmegaFi Sales Representative today at sales@omegafi.com or 800.276.6342. We are happy to schedule a webinar at a time convenient for you, where we can share the features and benefits of Vault Billing and Collections with all of your chapter's leaders.



OMEGAFISM
run, raise, connect.



2013 College of Excellence



When: July 24 through July 28, 2013

Location: Emory University, Atlanta, Georgia

The College of Excellence is the premier summer leadership school open to all Chi Phi Members. The program will focus on your role as a Brother of Chi Phi and developing your leadership skills and knowledge. By the conclusion of the week you will have a leadership plan to help you be a better leader.

Who should apply? Any Member of Chi Phi.

Cost: The program is free unless you fail to attend.

Register Online Now at
www.chiphi.org/coe



XΦ Accreditation

In 2009 Chi Phi piloted the first version of its accreditation program with select Chapters across the country. Beginning in the fall of 2011, Chi Phi Congress implemented the program for all Chapters and Colonies. The accreditation program was implemented with three goals:

1. Ensure a minimum level of Chapter operations within all Chi Phi Chapters and Colonies
2. Ensure the future health and success of Chi Phi Chapters and Colonies by identifying local and national operational areas for improvement and making resources in those areas available.
3. Provide a mechanism of reward and recognition to Chapters and Colonies who are exceeding minimum operating expectations and truly excelling.

The Fall 2012 process saw the implementation of an online submission process as well as a grading rubric for supporting documentation to standardize consistency to the grading process.

In the second year of full implementation of Chi Phi's accreditation program, much is being learned about our Fraternity, and how we can improve. Chi Phi, for the first time, has a mechanism to collect and set national benchmarks, such as how many service hours or dollars contributed to philanthropic organizations Chi Phi men are providing or what the average GPA for a Chi Phi Chapter is. This is valuable information to have as Chi Phi makes plans to return to dormant Chapter campuses, expand to new campuses, improve the undergraduate member experience, and continues to prove our relevancy and value to our many partners.

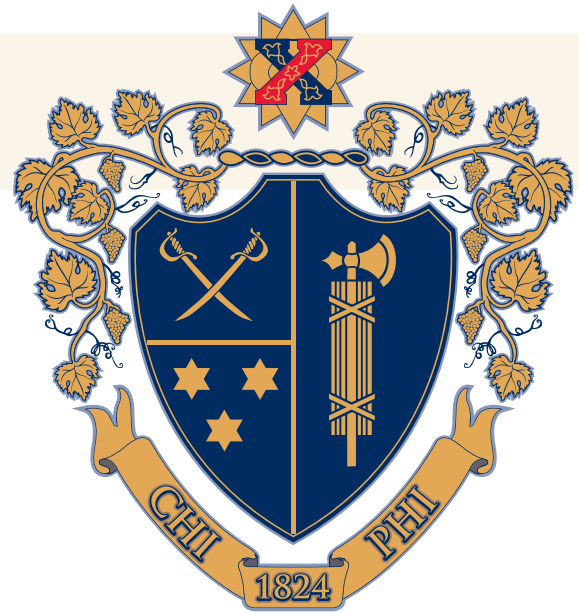
The accreditation program is a program developed and implemented by the undergraduate Membership of Chi Phi. As such, it will continue to evolve as the needs of the Fraternity changes.

This fall forty-four Chapters and Colonies submitted accreditation materials. Of those Chapters submitted, the raw score (self-reported survey portion only) was 72. This is a decrease of seven points from the spring 2012 raw score of 79. A score of 75 is required to reach accredited status. The decrease in raw scores and as a result the number of Chapters accredited can be attributed to a few changes: the addition of questions, particularly to the proactive risk management section of the program and the implementation of a standardized grading rubric for supporting documentation. Additionally, this was the first time Chapters could not see their self-reported raw score prior to submission.

Following recommendations from the 147th Chi Phi Congressional Accreditation Committee, additional questions and supporting documentation requirements were added to the risk management session. Accreditation results within the risk management section of the 2011-12 accreditation process were the highest of any other pillar within the process. The committee did not feel that the questions and supporting documentation within the risk management section were strong enough and therefore did not feel that the results accurately represented our Chapter's practices within proactive risk management. They recommended adding questions that more accurately assessed Chapter practices.

This year's fall semester results are the most accurate reflection of activities and operations of our Chapters and Colonies. Chapters are starting to understand the process, utilize the tools for improvement available, and institutionalize the process within their Chapters, meaning they have mechanisms to manage the process internally and are using the process to set goals and action plans. "We need to do a better job of educating Alumni about the program and how to help their Chapters use the process to improve, and we are in active conversations about opportunities to do so," states Deanne Walters, Director of Undergraduate Services. The Accreditation Committee, Chaired by Tom Deans, Phi Lambda Theta 1955, will continue to assess the Chapter Accreditation program, improvements that should be made, and support and resources need to assist our Chapters to be successful.

Accreditation Data



Total Submissions:..... **44**

Accredited with Distinction:..... **4** (10% of all submissions)

Chapters Accredited:..... **19**

Average Chapter GPA: **2.39**

Initiation Rate **83%**

Chapter and Colony report viewings **734 times**

Average New Member Education Period **6.7 weeks**

Chapters that maintain a savings account over 5% of their budget..... **27 Chapters & Colonies**

Chapters that completed a philanthropy project this term **36 Chapters & Colonies**

Average amount of time to complete..... **4 hours and 30 minutes**

FALL 2012 ACCREDITATION DATA BY PILLAR

| Pillar | Fall 2012 | Total |
|--|-----------|-------|
| Continuity - Recruitment & Retention | 7.72 | 11 |
| Proactive Risk Management | 6.17 | 9 |
| Asset Stewardship - Financial & Property Management | 9.81 | 14 |
| Academic Health | 7.85 | 11 |
| Total Membership Development | 7.21 | 11 |
| Heritage & Traditions | 6.09 | 9 |
| Chapter/Colony Operations | 9.19 | 12 |
| Organizational Networking & Community Engagement | 9.02 | 13 |
| Leadership Advancement | 5.77 | 7 |
| Alumni Relations | 4.77 | 6 |



Chapters, Alumni Associations & Alumni Clubs

Number of Initiates, Total Membership and Balance Owed is based on information available as of April 1, 2013.

ALPHA CHAPTER

at University of Virginia
Website: <http://chiphivuva.com/>
Membership: 44
Fall 2012 New Member class of 0
Not accredited with a score of 74
Balance Owed: \$945.00

BETA CHAPTER

at Massachusetts Institute of Technology
Website: <http://chiph.mit.edu>
Membership: 51
Fall 2012 New Member class of 10
Not accredited with a score of 70
Balance Owed: \$4,582.10

GAMMA COLONY

at Emory University
Website: None
Membership: 17
Fall 2012 New Member class of 19
New Colony, accreditation submission not required
Balance Owed: \$2,601.25

EPSILON COLONY

at Hampden-Sydney College
Website: http://chiph-hampden-sydney.com/Home_Page.html
Membership: 22
Fall 2012 New Member class of 4
Accredited with Distinction with a score of 89
Balance Owed: \$550.00

ZETA CHAPTER

at Franklin & Marshall College
Website: <http://www.fandm.edu/greeklife/chi-phi>
Membership: 58
Fall 2012 New Member class of 10
Not accredited with a score of 59
Balance Owed: \$1,340.00

ETA CHAPTER

at University of Georgia
Website: None
Membership: 97
Fall 2012 New Member class of 29
Accreditation not submitted
Balance Owed: \$10,818.76

In February, Eta held a philanthropy to raise funds for Hurricane Sandy relief. The men setup a 'Cut-a-thon' with a local salon. The 80 slots available for haircuts filled up fast before the event even began. Men paid \$15 and women \$25. Eta was able to donate \$5,000 to the local Red Cross chapter for Hurricane Sandy relief.

THETA CHAPTER

at Rensselaer Polytechnic Institute
Website: <http://thetaofchiph.org/>
Membership: 29
Fall 2012 New Member class of 8
Accredited with a score of 77
Balance Owed: \$0

IOTA COLONY

at The Ohio State University
Website: <http://www.facebook.com/ChiPhiOhioState?fref=ts>
Membership: 13
Fall 2012 New Member class of 15
Not accredited with a score of 43
Balance Owed: \$319.80

KAPPA CHAPTER

at University of Wisconsin
Website: <http://www.kappachiph.org/>
Membership: 40
Fall 2012 New Member class of 9
Accredited with a score of 81
Balance Owed: \$1,090.00



After years of dedication and lifetimes of experiences, the Kappa Colony has become the Kappa Chapter. On September 22nd, 2012, our Brothers, Grand Council members, National Fraternity Staff, friends, and family came back for the Badger Football game to celebrate the new charter. The Kappa Chapter once again worked with our familiar friends at GlobeMed. On Friday, November 9th, 2012, our men joined forces with the health-oriented student organization to raise funds contributing to their grassroots partner organization in Cambodia. The organization fund vocational training programs for youth belonging to underprivileged families.

LAMBDA CHAPTER

at University of California, Berkeley
Website: <http://chiph.webs.com>
Membership: 35
Fall 2012 New Member class of 11
Not accredited with a score of 67
Balance Owed: \$4,100.40

MU CHAPTER

at [Stevens Institute of Technology](#)
 Website: <http://www.stevens.edu/chipi/>
 Membership: 26
 Fall 2012 New Member class of 0
 Not accredited with a score of 72
 Balance Owed: \$1,165.00

NU CHAPTER

at [University of Texas](#)
 Website: <http://txchichi.org>
 Membership: 22
 Fall 2012 New Member class of 6
 Not accredited with a score of 63
 Balance Owed: \$1,100.00

XI CHAPTER

at [Cornell University](#)
 Website: <http://www.chipicornell.org/>
 Membership: 55
 Fall 2012 New Member class of 0
 Not accredited with a score of 71
 Balance Owed: \$1,100.00

RHO CHAPTER

at [Lafayette College](#)
 Website: None
 Membership: 5
 Fall 2012 New Member class of 0
 Accreditation not submitted
 Balance Owed: \$1,735.00

TAU CHAPTER

at [University of Alabama](#)
 Website: <http://www.chiphia.com>
 Membership: 64
 Fall 2012 New Member class of 18
 Accredited with a score of 79
 Balance Owed: \$-240.00

UPSILON CHAPTER

at [Hobart College](#)
 Website: <http://chiphihobart.org>
 Membership: 29
 Fall 2012 New Member class of 12
 Not accredited with a score of 64
 Balance Owed: \$4,055.53

PSI CHAPTER

at [Lehigh University](#)
 Website: <http://chiphilehigh.org>
 Membership: 49
 Fall 2012 New Member class of 2
 Accredited with a score of 76
 Balance Owed: \$1,135.52



The Psi Chapter at Lehigh University extends its greetings. The fall 2012 semester was filled with involvement. The brothers hosted a mid-autumn parents' weekend, offering a great opportunity for families to visit the beautiful Briarfield and meet our brotherhood. Psi has been active with several community service projects, including Adopt-A-Highway, Adopt-A-Family, and Habitat for Humanity. The Chapter plans to assist in the construction of Habitat for Humanity's 100th house in the Lehigh Valley.

OMEGA CHAPTER

at [Georgia Institute of Technology](#)
 Website: <http://www.gtchichi.org/>
 Membership: 64
 Fall 2012 New Member class of 14
 Not accredited with a score of 66
 Balance Owed: \$6,250.00

In March, Brothers of Omega raised \$5,421 for the St. Baldrick's Foundation. Over 200 fraternity men shaved their heads in support for childhood cancer research.

ALPHA-ALPHA CHAPTER

at [University of North Carolina, Chapel Hill](#)
 Membership: 56
 Fall 2012 New Member class of 12
 Not accredited with a score of 63
 Balance Owed: \$3,630.00

ALPHA-TAU CHAPTER

at [University of Michigan](#)
 Website: <http://www.alpha-tau.org>
 Membership: 98
 Fall 2012 New Member class of 20
 Accredited with a score of 79
 Balance Owed: \$9,000.00

Matt Gottlieb has been selected to join the campus IFC's Hazing Task Force. The HTF basically informs members of Greek Life on the dangers of hazing and performs investigations on hazing allegations - alongside police.

ALPHA-CHI CHAPTER

at [Ohio Wesleyan University](#)
 Website: <http://greek.owu.edu/chapters/chiphi.html>
 Membership: 34
 Fall 2012 New Member class of 10
 Not accredited with a score of 60
 Balance Owed: \$3,421.50

ALPHA DELTA COLONY

at [Pennsylvania State University](#)
 Website: None
 Membership: 31
 Fall 2012 New Member class of 31
 New Colony, accreditation submission not required
 Balance Owed: \$-450.00



The Alpha Delta Colony of Chi Phi at Penn State initiated its 31 new members over the weekend of November 9, 2012. The new members traveled to Phi Lambda Theta Chapter to be initiated. The Brothers have held weekly Brotherhood events such as playing sports together or going to different events on campus including the Nittanyville weeklong campout for the Penn State whiteout game against Ohio State. Through these events they have developed stronger Brotherhood bonds and grown together. They also held a bake sale and raised nearly \$300 for the Colony in only a couple nights of selling.

EPSILON DELTA CHAPTER

at Oregon State University
 Website: <http://groups.oregonstate.edu/chiphi/>
 Membership: 66
 Fall 2012 New Member class of 12
 Accredited with a score of 82
 Balance Owed: \$1,100.00

THETA DELTA CHAPTER

at University of Florida
 Website: <http://ufchphi.org>
 Membership: 101
 Fall 2012 New Member class of 22
 Not accredited with a score of 66
 Balance Owed: \$3,840.00

This fall, the Chapter accepted the largest New Member class since restarting on campus eight years ago. The Brothers continue to maintain and improve their house. Brother Quinn has recently been accepted into the prestigious Florida Blue Key organization, and Brother Freidkes is now the IFC Director of Scholarship.

RHO IOTA KAPPA CHAPTER

at University of Rhode Island
 Website: <http://www.chiphiuri.com/>
 Membership: 45
 Fall 2012 New Member class of 20
 Not accredited with a score of 72
 Balance Owed: \$2,485.64



The Chapter held successful Toys for Tots drive to honor two of their Brothers in the Marine Corps reserves. They also held a finals pancake night with the Alpha Xi Delta sorority to raise money for Boys and Girls Club of America and Autism Speaks.

ALPHA THETA CHI CHAPTER

at University of Nebraska
 Website: <http://www.facebook.com/ChiPhiUnl>
 Membership: 14
 Fall 2012 New Member class of 0
 Not accredited with a score of 48
 Balance Owed: \$2,550.00

DELTA XI CHAPTER

at West Virginia Wesleyan College
 Website: <http://www.chi-phi-deltaxi.moonfruit.com>
 Membership: 15
 Fall 2012 New Member class of 0
 Not accredited with a score of 58
 Balance Owed: \$25.00

KAPPA DELTA CHAPTER

at University of Rochester
 Website: None
 Membership: 31
 Fall 2012 New Member class of 0
 Accreditation not submitted
 Balance Owed: \$60.00

NU DELTA CHAPTER

at Florida State University
 Website: <http://www.chiphifloridastate.com>
 Membership: 159
 Fall 2012 New Member class of 31
 Not accredited with a score of 63
 Balance Owed: \$15,448.80



The Nu Delta chapter took part in many community service and philanthropic events. Our largest philanthropy in the fall was the Tinsley Memorial 5k on September 16, which raised over \$5,000 in honor of our fallen brother Cpt. John Tinsley. The Alumni Association and Brotherhood committee also put together a successful Homecoming weekend capped off by another win by the Alumni in the Nu Delta Alumni vs. Actives softball game.

XI DELTA CHAPTER

at Florida Institute of Technology
 Website: <http://www.xdaa.org/chapter>
 Membership: 34
 Fall 2012 New Member class of 13
 Accredited with Distinction with a score of 91
 Balance Owed: \$2,480.00

RHO DELTA CHAPTER

at Oglethorpe University
 Website: <http://chiphioi.org/>
 Membership: 39
 Fall 2012 New Member class of 18
 Accredited with a score of 75
 Balance Owed: \$2,205.00

SIGMA DELTA CHAPTER

at University of California, Davis
 Website: None
 Membership: 26
 Fall 2012 New Member class of 8
 Accreditation not submitted
 Balance Owed: \$660.00

PHI DELTA CHAPTER

at University of Tennessee
 Website: <http://www.chiphitut.com>
 Membership: 28
 Fall 2012 New Member class of 2
 Accredited with a score of 76
 Balance Owed: \$3,404.32



During the fall semester, the Brothers held a Brotherhood retreat where the whole Chapter camped out at the local camp ground.

PSI DELTA CHAPTER

at University of North Carolina, Charlotte
 Website: <http://chiphicharlotte.com>
 Membership: 41
 Fall 2012 New Member class of 16
 Accredited with a score of 81
 Balance Owed: \$1,645.22

ALPHA ZETA CHAPTER

at University of West Georgia
 Website: <http://uwg-chiphi.com/>
 Membership: 40
 Fall 2012 New Member class of 8
 Not accredited with a score of 64
 Balance Owed: \$1,100.00

DELTA ZETA CHAPTER

at University of South Florida
 Website: <http://www.facebook.com/chiphiusf?ref=ts>
 Membership: 23
 Fall 2012 New Member class of 12
 Accredited with a score of 76
 Balance Owed: \$1,100.00

PHI LAMBDA THETA CHAPTER

at Bucknell University
 Website: <http://www.orgs.bucknell.edu/chiphi/>
 Membership: 84
 Fall 2012 New Member class of 29
 Accredited with a score of 81
 Balance Owed: \$0

Phi Lambda Theta managed to complete a total of 781.75 hours of community service as well as make donations to several charities during the fall semester. The Chapter aimed to increase Chi Phi's presence and activity in the Bucknell Community, has established a "Three Star Event" system. This system encourages Brothers to attend at least 5 non-Chi Phi sponsored events each semester and support their Brothers in their extracurricular activities.

EPSILON ZETA CHAPTER

at [Humboldt State University](#)
 Website: None
 Membership: 24
 Fall 2012 New Member class of 9
 Accreditation not submitted
 Balance Owed: \$4,854.85

THETA ZETA CHAPTER

at [Texas A&M University](#)
 Website: <http://chiph.tamu.edu/>
 Membership: 14
 Fall 2012 New Member class of 9
 Accredited with a score of 77
 Balance Owed: \$1,820.00



Before classes began, the Chapter put together a car bash on the Texas A&M campus to raise money for St. Joseph's Hospital. In December an additional philanthropy concert benefiting St. Joseph's. Brothers mentor elementary children at College Hill Missionary Baptist Church every Thursday.

LAMBDA ZETA

Chapter at [St. Mary's University](#)
 Website: <http://www.stmarytx.edu/greek-life/index.php?site=chiPhi>
 Membership: 16
 Fall 2012 New Member class of 2
 Accredited with a score of 76
 Balance Owed: \$2,830.00

PI ZETA CHAPTER

at [Binghamton University](#)
 Website: None
 Membership: 27
 Fall 2012 New Member class of 6
 Not Accredited with a score of 68
 Balance Owed: \$6,026.25

TAU ZETA CHAPTER

at [Boston University](#)
 Website: <http://chiphibu.com/>
 Membership: 66
 Fall 2012 New Member class of 12
 Accredited with Distinction with a score of 83
 Balance Owed: \$6,261.52

PSI ZETA CHAPTER

at [University of Texas, Dallas](#)
 Website: None
 Membership: 79
 Fall 2012 New Member class of 17
 Accreditation not submitted
 Balance Owed: \$7,034.60

OMEGA ZETA CHAPTER

at [University of North Florida](#)
 Website: <http://www.facebook.com/ChiPhiAtUnf?fref=ts>
 Membership: 12
 Fall 2012 New Member class of 7
 Not accredited with a score of 36
 Balance Owed: \$6,024.86

DELTA PI CHAPTER

at [Georgia Southwestern State University](#)
 Website: <http://www.chiphideltapi.org>
 Membership: 13
 Fall 2012 New Member class of 5
 Not accredited with a score of 73
 Balance Owed: \$2,592.60

EPSILON THETA CHAPTER

at [East Carolina University](#)
 Website: None
 Membership: 41
 Fall 2012 New Member class of 8
 Accreditation not submitted
 Balance Owed: \$6,081.44

ZETA THETA CHAPTER

at [SUNY-Oneonta](#)
 Website: None
 Membership: 42
 Fall 2012 New Member class of 5
 Accreditation not submitted
 Balance Owed: \$3,091.60

ETA THETA CHAPTER

at [University of Maryland](#)
 Website: <http://umdchiph.org>
 Membership: 37
 Fall 2012 New Member class of 9
 Accredited with a score of 81
 Balance Owed: \$0

IOTA THETA CHAPTER

at [Schreiner University](#)
 Website: <http://students.schreiner.edu/activities/sub-chiph/index.aspx>
 Membership: 8
 Fall 2012 New Member class of 0
 Accredited with a score of 79
 Balance Owed: \$1,422.50

LAMBDA THETA CHAPTER

at [University of Massachusetts Dartmouth](#)
 Website: <http://dartmouth.umasschiph.org/>
 Membership: 36
 Fall 2012 New Member class of 20
 Not accredited with a score of 67
 Balance Owed: \$1,820.00

MU THETA CHAPTER

at [University of Incarnate Word](#)
 Website: <http://www.uiw.edu/studentlife/ChiPhi.htm>
 Membership: 23
 Fall 2012 New Member class of 5
 Not accredited with a score of 68
 Balance Owed: \$-0.13

NU THETA CHAPTER

at [The College of William and Mary](#)
 Website: <http://web.wm.edu/so/chiph/?svr=www>
 Membership: 15
 Fall 2012 New Member class of 6
 Not accredited with a score of 69
 Balance Owed: \$240.00

XI THETA CHAPTER

at [Southern Utah University](#)
 Website: None
 Membership: 21
 Fall 2012 New Member class of 4
 Accreditation not submitted
 Balance Owed: \$4,720.14

OMICRON THETA CHAPTER

at [SUNY Plattsburgh](#)
 Website: None
 Membership: 36
 Fall 2012 New Member class of 15
 Accredited with Distinction with a score of 86
 Balance Owed: \$1,880.00

PI THETA CHAPTER

at [University of Wisconsin-La Crosse](#)
 Website: <http://uwlmyorgs.collegiatelink.net/organization/chiph>
 Membership: 27
 Fall 2012 New Member class of 7
 Accredited with a score of 78
 Balance Owed: \$1,100.00



September 21, 2012 the University of Wisconsin-La Crosse Colony became the Pi Theta Chapter! Members of the Grand Council were in attendance for the celebration. The Chapter has also held their first Alumni, Friends and Family weekend.

Gladfelter Circle

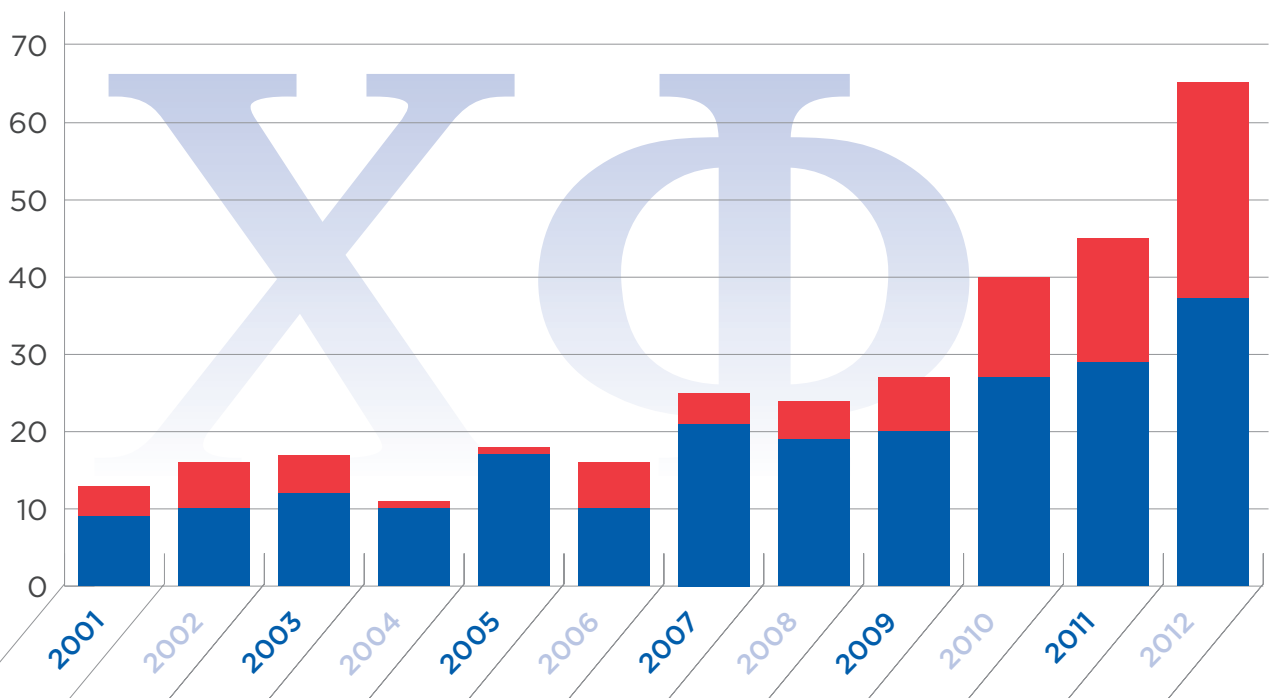
Breaks New Record with Membership



GLADFELTER CIRCLE

Each year hundreds of donors invest in the future of Chi Phi and our Brothers. In 2000, the Gladfelter Circle was formed to recognize those donors making an annual investment of \$2,000 or more in Chi Phi Brothers. The Circle is named in honor of long-time Executive Director, Carl Gladfelter, Alpha-Tau 1933 who has taught many men what it means to invest in Brotherhood. In 2012, a record number of Alumni, friends and corporations joined the Gladfelter Circle making a gift between January 1, 2012 and December 31, 2012.

Gladfelter Circle Membership Growth



Total Members

13

16

17

11

18

16

25

22

27

40

45

65

Members with Distinction

4

6

5

1

1

6

4

5

7

13

16

27

GLADFELTER CIRCLE WITH DISTINCTION

\$5,000 and above

Calvin R. Allen Jr., Eta 1971
Peter A. Amann, Eta 1968
Michael Beall, Alpha 1976
Reginald M. Brooks, Alpha-Chi 1946*
Dr. Robert P. Christopher, Alpha-Tau 1954
David L. Fortson, Eta 1966
Ron P. Frank, Nu Delta 1983, Iota Zeta 1989,
Delta Zeta 2000
John F. Harris, Alpha 1982
John R. Henderson, Alpha 1969
John E. Hutzler, Kappa Delta 1990
R. Charles Loudermilk, Omega 1948, Alpha-Alpha 1950
Gene W. Milner Jr., Eta 1975
Robert Mizell, Alpha 1978
Bower R. Patrick III, Alpha 1965
J. Wray Pearce, Tau 1966
Honorable Albert M. Pickett, Eta 1963
Dr. Jose B. Quintana, Theta Delta 1968
Willis G. Ryckman III, Eta 1966
Hon. Carl E. Sanders, Eta 1945
J. Rutherford Seydel, Eta 1986
Christopher J. Shuler, Alpha Zeta 1984
Dr. Jim P. Soderquist D.D.S., Alpha 1967
Al C. Warrington IV, Theta Delta 1958, Nu Delta 1979
John G. Watson III, Theta 1971
Jim W. Wimberly Jr., Eta 1965

Friends and Corporate Partners

Jeff Lorberbaum
Xi Delta Alumni Association

GLADFELTER CIRCLE

\$2,000 - \$4,999

Dr. Tony F. Afong, Theta Delta 1991
Daniel W. Ahearn, Theta Delta 1999
Dr. Bruce D. Carlson, Epsilon Delta 1961
John Coffman, Beta 1966
John K. Coggins Jr., Eta 1978
David F. Davis, Theta Delta 1973
Dan H. Dozer CAE, Iota 1965
Ron Drag, Psi Delta 1984
Talmage L. Dryman Jr., Omega 1945
Richard S. Gilbert, Rho 1962
James B. Graves, Nu 1948
Steve Hopkins, Nu 1999
Dallas M. Kersey, Alpha 1964
Robert N. Klaffke, Alpha-Tau 1978
Frank G. Lumpkin III, Eta 1980
George M. MacDonald, Kappa Delta 1971,
Iota Zeta 1989, Eta Theta 2011
John W. McElderry III, Eta 1994
Denman K. McNear, Beta 1948
James A. McPherson, Theta Delta 1975
E. Lee Morris III, Nu 1989
Paul E. Perry, Iota 1973
Benjamin S. Portman, Phi Lambda Theta 2007
Joshua L. Price, Epsilon Delta 1998
Senour H. Reed, Eta 1979
Andrew W. Schultz Sr., Alpha Delta 1960
David L. Skelton, Omega 1979
Hans U. Stucki, Iota 1970
Cory J. Thomas, Mu Delta 1986
Kirk Thomas, Delta Theta 2005
Stephen P. Tolleson, Omega 1969
John H. Underwood, Kappa 1981

Friends and Corporate Partners

Elizabeth Knott
Fred Maglione
Mrs. Mary Wydman
Anthony E. Young
Theta Alumni Association
Vital Solutions

* Chapter eternal



BROTHERS LEAVE A *Lasting* *Legacy*

Alumni with a vision and inclination to provide for Chi Phi's long-range needs can make a difference through the MacLean Legacy Society. The Society recognizes those generous Alumni and friends who have projected their love and support for Chi Phi and its mission beyond the horizon of their own mortality by making a planned or estate gift of \$10,000 or higher. Life's pressures and the uncertainty created by the current economic climate often prohibit generous alumni and friends from fully supporting Chi Phi or their Chapter to the extent they might like. Planned gifts are a means to make a substantial gift without depleting day-to-day income or retirement assets. Additionally, planned gifts provide substantial tax advantages to many and may even offer opportunities for lifetime income to donors or their family members. Most importantly, MacLean Legacy Society gifts are a way for Alumni and friends to share in both the present and the future of Chi Phi by making institution-changing impact on students, Chapters and Chi Phi in perpetuity.



AS OF JANUARY 28, 2013, THE FORTY-TWO MEMBERS OF THE MACLEAN LEGACY SOCIETY ARE:

Anonymous

Anonymous

Bates Block, Gamma 1940, Eta 1942*

Reginald M. Brooks, Alpha-Chi 1946*

William M. Byrd, Nu 1953*

Brooks R. Caldwell, Epsilon Delta 1925

Ron Coleman, Alpha Zeta 1983

Jack C. Cook, Alpha 1948*

David F. Davis, Theta Delta 1973

James Davis, Omega 1975

D. Fort Flowers, Omega 1983

Richard Gilbert, Rho 1962

Joseph V. Goeller, Iota Delta 1963

Ed Greenwald, Pi Delta 1971

Tom Guinther, Iota 1972

R. Preston Herren, Gamma 1964

James B. Hill, Iota Delta 1960

Joseph E. Jones, Epsilon 1958

Robert D. Jones*

Robert Klaffke, Alpha-Tau 1978

Herman Charles Krannert, Sigma 1912*

Richard T. Lane, Kappa Delta 1993

George Langford, Alpha 1950

Randy Loos, Theta Delta 1977

J. Darryl McCall, Psi Delta 1982*

Eugenia L. Neel*

William D. Nuss, Iota Delta 1968

Donald Pearson, Theta Delta 1959

Gray C. Ramsaur, Theta Delta 1939*

Jonathan J. Rawls, Rho Delta 1985

Senour Reed, Eta 1979

Andrew W. Schultz Sr., Alpha Delta 1960

Ross S. Shoolroy, Iota 1939*

Christopher J. Shuler, Alpha Zeta 1984

Raymond T. Snapp, Iota Delta 1967

James Soderquist, Alpha 1967

George Spaur, Epsilon Delta 1925*

Harold C. Steinke, Kappa 1943*

Herman O. Swanson, Alpha-Tau 1914*

Richard W. Taylor, Gamma 1961

Al Warrington, IV, Theta Delta 1958

Charles D. Wilson, Theta Delta 1966

** Chapter eternal*

Do you see a name missing from this list? Have you already included the Chi Phi Educational Trust or your Chapter in your estate plan? Are you interested in learning about the benefits of gift planning? Contact Director of Development Elizabeth Knott at 404.231.1824 or knott@chphi.org to discuss in confidence any plans you have already put into place or are considering.

You Can Help to Protect Chi Phi's

Heritage



As an initiated member of Chi Phi, you appreciate the significance of the name and symbols of Chi Phi. To protect the integrity of our name, Chi Phi registered our marks with the United States Patent and Trademark Office. These marks include the name "Chi Phi," Greek letters, coat-of-arms, badge and flag.

Protecting our name is our right and our responsibility. It is a right and responsibility recognized by the courts. In April, 2000 a District Court ruled that fraternities and sororities have the right to enforce and protect their registered marks. For years, companies selling merchandise bearing the logo or symbols of a University, professional sports team or organization had to have permission to use those logos or symbols because they were recognized as the "trigger mechanism for sale of the product." In the early 1980s, some courts refused to recognize that fraternities and sororities should have the same right to protect their marks.

Chi Phi is using the fuel from the court's decision to join numerous other Greek organizations in trademark protection. We have formed an alliance with Affinity Consultants, experts in administering comprehensive licensing programs for Greek organizations. Their goal is to license a variety of companies who provide quality licensed Chi Phi products at reasonable prices and with exceptional service.

Chi Phi has a link to www.GreekLicensing.com and www.GreekQuote.com, where you can locate the complete list of our licensed vendors and search for specific products. You can browse through those vendors' online catalogs as well. The sites will be updated frequently, as our roster of licensed vendors will continue to grow and the variety of quality products available to you will increase.

You associate great memories with Chi Phi and its symbols; your Initiation, a retreat, Alumni events. To preserve those memories, and stop companies who misuse Chi Phi's symbols for personal profit because they are not familiar with the true meaning of Chi Phi and our mission, we must take a stand. By refusing to purchase products that do not carry the Official Licensed Product seal, we can ensure "Chi Phi" always stands for quality.

If you have questions about licensing, or want more information on how to get your local vendor and campus bookstore licensed, please contact info@affinityconsultants.com or call 760.734.6764.

Protecting Our Legacy

Chi Phi Licensed Products and Services

Nike. Jeep. Timberland. These brands and their logos have trademark laws protecting them from misuse. Our Fraternity name is no different. It is our right and responsibility to protect our name and the symbols that we have valued for more than 189 years. Therefore, Chi Phi registers its marks with the United States Patent and Trademark Office and is taking measures to ensure our marks are used appropriately in marketing and merchandising.

Chi Phi and Affinity Consultants

Chi Phi has aligned with 85 other Greek organizations through working with Affinity Consultants, a company founded to help organizations protect the integrity and ownership of their trademarks. Affinity Consultants works with Chi Phi in granting licenses to companies that manufacture merchandise bearing our name, Greek letters, crest, badge and symbols. Through the licensing program, vendors submit all products and designs for approval to insure that are marks are not associated with any products and/or designs that glorify alcohol abuse, sexism, hazing, drugs or discrimination.

Why Work with Licensed Vendors?

The relationship between the fraternity and licensed vendors is a win-win situation. A licensed vendor agrees to work with Chi Phi to ensure proper use of our trademarks and to sell high quality products at reasonable prices and to offer good customer service. In exchange, approved vendors are given the approval to produce products and/or services in association with our organization.

How Can You Help

Alumni and collegians play an important role in the success of the licensing program. Licensed manufacturers will place a special Official Licensed Product Logo (see image to the right) designed for members of Affinity Consultants on all items bearing Chi Phi symbols. Look for this logo when shopping in campus bookstores, Greek specialty stores, catalogs and web sites. Members who buy products with this special seal can do so with confidence, knowing the fraternity has approved the product and they are purchasing from a licensed vendor. In addition, chapters and alumni associations can support the program by having special items produced only by licensed vendors.

To locate an always up-to-date list of Chi Phi's officially licensed vendors, please visit www.greeklicensing.com.



If you would like to nominate to a vendor to become licensed with our organization, please send their company information including name, address, phone, email and web to info@affinity-consultants.com.

Alumni News & Notes

In December, RETTEW Associates, Inc. announced The American Public Works Association selected **Jason Snyder, Rho 1994** as Professional Manager of the Year in 2012.

A Senior Project Manager in Transportation, Snyder was nominated by RETTEW. He is responsible for setting and managing project scopes, budgets and schedules, as well as ensuring exceptional project delivery and client satisfaction. Snyder is also responsible for business development, client retention, marketing, studies of potential expansion into new service areas and geographic diversity. His 18-year career has spanned many positions and firms, always with a commitment to serving the public sector.

Snyder graduated in 1994 from Lafayette College with a Bachelor of Science degree in civil engineering. He has worked as a highway engineer and municipal engineer, helping North Hopewell Township secure almost \$1 million in grant funding for its transportation projects. His other accomplishments include coordinating local lead projects completed in tandem between PennDOT and local municipalities; project managing and designing the first modern roundabout in PennDOT District 8-0; managing and designing the final two phases of York County's Heritage Rail Trail; and providing preliminary design for the Loganville Bypass project.



Jason Snyder, Rho 1994



Peter Littlefield (left); Xi 1959, Omega 1960 and **John Hunter (right); Xi 1959, Omega 1960** both met while studying Mechanical engineering at Cornell University and joined the Xi Chapter of Chi Phi Fraternity. A year later they both transferred to the Omega Chapter at Georgia Institute of Technology for Industrial Engineering. Both Brothers served as ushers in each other's weddings. After each serving tours in the Navy, Littlefield and Hunter both earned their MBA from the University of Pennsylvania. Over the years the two have stayed in touch.

Send your news and high resolution photographs to Collin Zimmerman (zimmerman@chphi.org). Did you recently get married? Have a baby? Change jobs? Retire? Reconnect with some of your Fraternity Brothers? Let us know, and send pictures!

the men of 1824 Chi Phi



Students Investing in Students

The Men of 1824 is a special group of undergraduate Brothers and recent Alumni (five years or less since graduation) who share a long-term vision and commitment to Chi Phi by making a financial commitment of \$25 or more to support the overall educational initiatives of the Fraternity. The 1824 class of 2013 has started small with only 96 members in their ranks today, but they are showing a great commitment to Chi Phi. These men have invested \$4,125 in educational programs and scholarships.

Brothers can join the Men of 1824 class of 2013 until June 30, 2013. Any gifts made by April 8, 2013 will qualify for March Mania Challenge points for the Brother's Chapter. Additionally, any Chapter reaching 100% of active members participating in the Men of 1824 will receive a custom corn hole set for the Chapter. To join the Men of 1824 2013 class visit www.chiphicampaign.com/donate.

2013 Chi Phi Men of 1824 Class

(as of January 28, 2013)

Nicholas S. Abrahams, Nu Delta 2010
 Peter B. Acosta, Mu Theta 2011
 Edward W. Adams, Tau Zeta 2013
 Qaasim Ahmed, Tau Zeta 2013
 Matthew C. Alex, Tau Zeta 2014
 Michael P. Barbalace, Alpha Delta 2014
 Zach Bearden, Alpha Theta 2014
 Morgan Bellin, Tau 2014
 Naman S. Benday, Nu Theta 2014
 Andrew D. Booker, Omega 2013
 Jason D. Bornstein, Delta Zeta 2012
 Ned M. Bowden, Epsilon 2014
 Carl A. Brendes, Epsilon Theta 2013
 William Z. Brown, Iota 2015
 Zachary C. Cathcart, Psi Zeta 2014
 Taylor W. Cheek, Omega 2014
 Alexander J. Cihla, Lambda 2014
 Andrew T. Claus, Theta Delta 2010
 Lucas Da Pieve, Phi Delta 2013
 Mark J. Dipsey Jr., Psi 2015
 James M. Dooley, Lambda Theta 2014
 Matthew H. Eason, Theta Theta 2014
 David J. Ebner, Delta Zeta 2008
 Albert Eloyan, Lambda 2012
 Michael J. Erickson, Upsilon 2010
 Austin Garcia, Delta Pi 2013
 Nick Garson, Nu Delta 2014
 Pablo Gonzalez, Lambda Zeta 2014
 Jeffrey Greenhouse, Theta Delta 2014
 Philip E. Grundy, Lambda Theta 2011
 Michael J. Gustin, Tau Zeta 2014
 Tyler J. Hack, Xi Theta 2011
 Darion J. Hatten Jr., Theta Theta 2014
 Michael G. Healy, Sigma Zeta 2008
 Steven P. Howard, Omega 2014
 Aaron M. Ide, Theta 2009
 Paul Janowicz, Alpha-Chi 2008
 Kyle A. Johnson, Rho Delta 2016
 Sean P. Kelley, Rho Iota Kappa 2015
 Ryan A. Kirchoffer, Delta Zeta 2014
 Clark R. Kjorlaug II, Omega 2012
 James W. Koy, Theta Zeta 2013
 Sean Kuo, Eta Theta 2014
 Nicholas Laferriere, Theta 2015
 Patrick A. Lee, Psi 2013
 John M. Malone, Xi Delta 2014
 Joey P. Mancini, Alpha 2007
 Brian Patrick Marion, Alpha-Chi 2008
 Ross Masters, Alpha-Alpha 2014
 Kellen P. Miller, Epsilon Zeta 2011
 Graham F. Morris, Nu Delta 2014
 Sean P. Murphy, Lambda Theta 2007
 Daniel J. Nealon, Sigma Zeta 2009
 Adam T. Pannier, Pi Theta 2013
 Tom H. Pappas, Iota Theta 2013
 Nicholas G. Patrick, Eastern Illinois University Colony 2012
 Nicholas R. Perez, Xi 2014
 Justin M. Pounders, Nu Delta 2010
 Marcus A. Powers, Theta Delta 2009
 Josh S. Pruner, Rho Delta 2016
 David L. Przybylo, Theta 2010
 Jason Raia, Omega Zeta 2014
 Ryan J. Riss, Alpha Theta Chi 2013
 Taylor D. Roberts, Alpha Zeta 2012
 Brandon T. Roth, Nu Delta 2009
 Michael A. Rulison, Rho Delta 2016
 Mark J. Rykken, Delta Xi 2013
 Chandler A. Salome, Theta Zeta 2011
 Jorge L. Sanchez, Theta Delta 2013
 Stuart E. Santos, Nu Delta 2009
 Nicholas D. Scher, Nu Delta 2012
 Kyle A. Schlenker, Delta Zeta 2013
 Paul L. Smith, Alpha Theta Chi 2012
 Benjamin B. Spurlock, Delta Xi 2015
 Christian Sypavongsay, Alpha Theta Chi 2014
 Lukas Strasser, Rho Delta 2013
 Corey Strinka, Alpha-Chi 2008
 Stevens E. Tombrink, Nu Delta 2012
 Matthew A. VanDuijn, Beta 2010
 Andrew M. Walls, Omega 2014
 Austin F. Weyant, Delta Zeta 2012
 Stephen A. Webber, Omega 2013
 Scott M. Winters, Pi Theta 2015
 Michael C. W. Woolf, Phi Delta 2010
 Collin A. Zimmerman, PCT Colony 2010, Pi Theta 2012

Chapter Eternal

ALPHA CHAPTER

University of Virginia

Mr. Ralph H. Alexander Jr., Alpha 1948, died in January 2013.
Mr. Harry E. DePass III, Alpha 1957, died, no date given.
Mr. David M. Turner, Alpha 1941, died, no date given.
Mr. T. Roane Waring Jr., Alpha 1940, died, no date given.
Mr. Rhodes E. Wray, Alpha 1956, died, no date given.

BETA CHAPTER

Massachusetts Institute of Technology

Mr. Milton R. Daniels Jr., Beta 1948, died on October 21, 2011.

Mr. James C. Edgerton, Beta 1966, Rho Iota Kappa 1986, died on December 7, 2012.



James C. Edgerton, 68, of Arlington, MA, died on December 7, 2012. James was a graduate of Marcellus High School in 1962 and M.I.T. in 1966. He was an Eagle Scout, a member of the National Honor Society and president of his high school class. James also participated in football, wrestling, high school band and was active with ham radio communications. In his later life, James was a charter member of the Battleship Saratoga Foundation and an active leader in Chi Phi Fraternity, at one time serving as the Grand

Alpha. James is survived by one brother, two nephews, two aunts and several cousins. There will be no calling hours, and a graveside service will be announced at a later date.

Dr. George T. Eldis, Beta 1966, died on November 1, 2012.
Mr. Hugo C. Johnson Jr., Beta 1946, died on October 23, 2009.
Mr. Peter N. Kyros, Beta 1946, died on July 10, 2012.
Mr. Robert L. Seidler, Beta 1947, died on June 23, 2012.
Mr. Jeffery L. West, Beta 1952, died on March 30, 2012.

GAMMA CHAPTER

Emory University

Mr. John L. Westmoreland Jr., Gamma 1944, died on December 5, 2012.

DELTA CHAPTER

Rutgers University

Mr. W. Burton Salisbury Jr., Delta 1953, died on December 1, 2011.

ZETA CHAPTER

Franklin & Marshall College

Dr. William C. Cooper, Zeta 1953, died on March 24, 2011.

ETA CHAPTER

University of Georgia

Mr. Sam M. Ransom, Eta 1951, died on November 23, 2012.

THETA CHAPTER

Rensselaer Polytechnic Institute

Mr. Richard I. Else, Theta 1948, died on February 10, 2013.
Mr. William J. Raymond, Theta 1960, died on December 26, 2012.

IOTA CHAPTER

Ohio State University

Mr. George J. Matthey, Iota 1949, died in 2012.
Mr. Robert L. Nichol, Iota 1958, died on September 14, 2012.

KAPPA CHAPTER

University of Wisconsin

Mr. Stephen C. Behrens, Kappa 1967, died in March 2012.
Mr. John K. Brens, Kappa 1965, died, no date given.

LAMBDA CHAPTER

University of California, Berkeley

Mr. James D. Nichols, Lambda 1976, died on November 11, 2012.

MU CHAPTER

Stevens Institute of Technology

Mr. Lee W. Jacobi, Mu 1961, died, no date given.
Mr. William L. Wool Jr., Mu 1944, died, no date given.

NU CHAPTER

University of Texas

Mr. Rual Askew Jr., Nu 1942, died on December 6, 1979.
Mr. Thomas A. Bishop, Nu 1962, died, no date given.
Mr. William R. Cathey, Nu 1953, died on April 15, 1979.
Mr. B. Devane Clarke Jr., Nu 1950, died July 1, 2011.
Mr. James R. Coleman, Nu 1968, died, no date given.
Mr. Patrick C. DeBlanc, Nu 1966, died on July 21, 2005.
Mr. Douglas W. Ford, Nu 1951, died, no date given.
Mr. Richard P. Garmany, Nu 1959, died on March 7, 2004.
Mr. Truman F. Gill, Nu 1944, died on January 14, 2009.
Mr. John F. Heard, Nu 1943, died in 2005.
Mr. Jerry E. Long, Nu 1962, died on February 11, 2009.
Mr. John G. Martel Jr., Nu 1938, died, no date given.
Mr. Reed W. Mathews, Nu 1951, died on July 24, 2006.
Mr. James B. Newton Jr., Nu 1963, died on March 8, 1986.
Mr. Milburn M. O'Dowd Jr., Nu 1968, died on February 21, 2010.
Mr. Frank L. Plemons, Nu 1956, died, no date given.
Mr. Jack D. Riggs, Nu 1949, died on August 20, 2001.
Mr. Edwin J. Schryver, Nu 1947, died on January 2, 2012.
Mr. Charles M. Smith, Nu 1960, died on March 2, 1984.
Mr. Joseph M. Vander Stucken, Nu 1922, died on November 8, 1997.
Mr. Edward D. Weston, Nu 1959, died in 1990.
Mr. Daniel M. Wolfe, Nu 1950, died, no date given.

ALPHA-ALPHA CHAPTER
University of North Carolina, Chapel Hill

Mr. Richard C. Armstrong, Alpha-Alpha 1957, died on November 25, 2012.



Richard "Dick" C. Armstrong died Sunday, November 25, 2012 surrounded by family after a lengthy battle with several illnesses. He was 82 years old. A memorial service was held in his honor on Friday, December 7, 2012 at Holy Innocents' Episcopal Church. An Internment Service to be attended by immediate family will immediately precede the memorial service.

Dick is survived by his wife of 55 years, Sue Owens Armstrong, a son Neil and daughter-in-law Kimberly Armstrong, a son Ross and daughter-in-law Carol Armstrong, a daughter Hope Armstrong Howe and son-in-law Thomas Howe. His grandchildren are Hutson Armstrong, Parker Armstrong, Hannah Armstrong and NRyan Armstrong. He is also survived by his sister Betsy Barbee and her husband Morris Barbee, and their children Becky Barbee and Morry Barbee and his wife Leigh Barbee, along with cousins and friends all of whom he cherished.

Dick was born in Queens, New York on April 11, 1930 and later moved and attended LaGrange High School in LaGrange, NC. He attended the University of North Carolina at Chapel Hill ("UNC"), remained an avid fan and participating member of the UNC Alumni Association, and was the oldest living member of the Chi Phi Fraternity at UNC. Dick was also a member of the United States Army and was a veteran of the Korean War.

After getting married in 1957, Dick worked in the real estate industry eventually moving on into mortgage banking and excelling in several high level positions focusing on commercial real estate mortgage financing nationwide. Dick was known for his expertise in financing hospitality properties and apartments in particular.

Dick was also known as a hard worker who was extremely dedicated to his family. He and his family were proud members of Holy Innocents' Episcopal Church in Atlanta, GA for many years. Other than working hard and raising his family, Dick's other passion has been being a member of the Optimist Club which raises money for programs that positively affect the lives of youth in the community. Having been a member of the Optimist Club since 1959, Dick was Charter President of the North Perimeter Optimist Club in Atlanta and, through the years, started numerous other Optimist Clubs in other locations in the southeast. He also served as a former South Carolina District Governor of the Club. Dick's unyielding passion to serve the Optimist Club to bring out the best in children within the community earned him the privilege of being named on the Armstrong-Raney Youth Community Service Award, an annual award given to an exceptional youth within the community.

Mr. David P. Shannon, Alpha-Alpha 2012, died on October 27, 2012.
Mr. H. Allen Wills, Alpha-Alpha 1941, died, no date given.

ALPHA-TAU CHAPTER
University of Michigan

John E. Moser, Alpha-Tau 1938, died, no date given.

XI CHAPTER
Cornell University

Mr. George E. Cole, Xi 1941, died on March 31, 2012.
Mr. William A. Foulkrod, Xi 1967, died on November 18, 2011.
Mr. Richard T. Hough, Xi 1946, died on March 2, 2011.
Mr. Herbert G. Lyttle Jr., Xi 1944, died on July 11, 2012.
Mr. Warwick McCutcheon, Xi 1940, died on June 8, 2012.
Mr. Robert Morris, Xi 1949, died on April 11, 2010.
Mr. Daniel A. Oas, Xi 1967, died on July 12, 2011.
Mr. Richard L. Stimson, Xi 1941, died on November 3, 2009.
Mr. W. Barlow Ware, Xi 1947, died on December 19, 2011.
Mr. Jerome S. Wyman, Xi 1952, died on August 20, 2010.

OMICRON CHAPTER
Yale University

Mr. Richard B. Jordan, Omicron 1957, died on Friday, September 7, 2012.

PI CHAPTER
Northwestern University

Mr. Newell E. France, Pi 1952, Sigma 1952, died on March 21, 2012.

SIGMA CHAPTER
University of Illinois

Mr. Wright M. Catlow, Sigma 1952, died in November 2011.
Mr. Robert E. Musser, Sigma 1942, died, no date given.
Mr. John J. Roche, Sigma 1937, died on January 25, 2013.

PHI CHAPTER
Amherst College

Mr. Allan A. Eaton, Phi 1944, died on June 27, 2012.

CHI CHAPTER
Dartmouth College

Mr. J. MacDonald, Chi 1951, died, no date given.

PSI CHAPTER
Lehigh University

Mr. William J. Gesner, Psi 1952, died, no date given.
Mr. Harry H. Heist, Psi 1960, died May 25, 2012.
Mr. Charles E. Lehr, Psi 1944, died, no date given.

OMEGA CHAPTER
Georgia Institute of Technology

Mr. Robert A. Pendergrast, Omega 1944, died on July 26, 2012.

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Chapter Eternal

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ALPHA-CHI CHAPTER **Ohio Wesleyan University**

Col. Daniel E. Albright, Alpha-Chi 1958, died on October 24, 2009.
Mr. William M. Bengé Jr., Alpha-Chi 1948, died on December 27, 2012.
Mr. Jonathan Blakely, Alpha-Chi 1960, died on December 7, 2012.
Mr. Murray M. Cochrane, Alpha-Chi 1943, died on October 18, 2012.

Mr. Robert J. McDevitt, Alpha-Chi 1951, died on February 18, 2013.

Robert was born in Mt. Vernon, Ohio on October 24, 1929 to Ruth and Jay McDevitt, long since deceased. Bob was 83 when he died after a long battle with Parkinson's Disease and Cancer. He was predeceased by his only sibling, Eleanor Kilroy, in 2012. He is survived by his loving wife Connie and his daughter Susan Best, son-in-law Jon Best and beloved granddaughter, Kathryn Best of Scotch Plains, NJ. He is also survived by a son, James McDevitt. Bob spent most of his life in his home town of Mt. Vernon and attended Mt. Vernon High School, and then on to Ohio Wesleyan for his BA where he was a member of Chi Phi Fraternity. He then went on to graduate at The Ohio State University Moritz College of Law where he received his JD degree in 1954. Immediately after law school he was inducted into the US Army and for the next two years he worked in the Battalion Office at Fort Knox, KY. When his service was over, he returned to Mt. Vernon and went into law practice with his father, Jay McDevitt, and Charles Ayers, both of whom later left to become Knox County Court of Common Pleas Judges. Other partners were added.

While living and working in Mt. Vernon, he served on the Board of Directors for the former Knox County Savings Bank, the Mr. Vernon Public Library and was a member of the Ohio Bar Association. He was a Mason and a Shriner and in 2006 was made a life-time member of the Mount Zion Shrine in Mt. Vernon. He also supported the Shriners in Sarasota. He was a former member of the Mt. Vernon Gay Street Methodist Church. He also had a membership at the Mt. Vernon Country Club. At the end of 1982, he sold his law practice to his then partners and moved to Sarasota. He was recruited immediately as a Vice President in the Trust Department of what is now the Sun Trust Bank. He worked there a number of years before retiring a second time. After retiring he became a volunteer at SCORE and was elected recording secretary.

He later also volunteered at Selby Library. Bob was well-known for his sophisticated wit and his never-ending sense of humor. Everyone liked to be near him as they didn't want to miss a word. Paul Lynde, the famous comedian and also a native of Mt. Vernon, once offered him a job as a writer after hearing him speak. He and his wife spent their retirement traveling in Europe on land tours, and then progressed to cruising across the Atlantic many times and visiting countries around the Mediterranean. After a long cruise to South America, their last cruise, they concentrated on PT for Bob. He was a really genuine person and never lost the values he learned growing up in the Great Depression era. A one of a kind! At Bob's request, there will be no services.

ALPHA DELTA CHAPTER **Pennsylvania State University**

Mr. Joseph F. Bondi, Alpha Delta 1947, died on April 26, 2009.
Mr. John R. Brown, Alpha Delta 1952, died on February 18, 2012.
Mr. Walter H. Cramer, Jr., Alpha Delta 1950, died on May 18, 2012.
Mr. Robert W. Whittall, Alpha Delta 1946, died in April 1992.
Mr. Brian J. Wittig, Alpha Delta 1973, died on December 29, 2011.

ZETA DELTA CHAPTER **University of Connecticut**

Mr. Valentino C. Buonaiuto, Zeta Delta 1956, Mu 1956, died, no date given.

ETA DELTA CHAPTER **University of Southern California**

Mr. Richard C. Davis, Eta Delta 1946, died, no date given.

THETA DELTA CHAPTER **University of Florida**

Mr. Theodore P. Littlewood, Theta Delta 1941, died October 6, 2011.
Mr. Frank P. Planes, Theta Delta 1960, died on November 26, 2012.

IOTA DELTA CHAPTER **Indiana University**

Mr. Stephen B. Givens, Iota Delta 1963, died on September 13, 2012.

ALPHA THETA CHI CHAPTER **University of Nebraska**

Mr. G. Nelson Lyon Jr., Alpha Theta Chi 1939, died on May 16, 2007.

MU DELTA CHAPTER **Auburn University**

Mr. John F. Payne, Mu Delta 1996, died on July 17, 2011.
Mr. Ollie M. Smithwick III, Mu Delta 1996, died, no date given.

Add Two Lines to Your Will and Make an Everlasting Impact

Making a gift to Chi Phi through a Last Will and Testament is easy. Individuals should instruct their attorney to add a provision to their will naming the Chi Phi Educational Trust as a beneficiary of their estate.

The following language is appropriate:

I give, devise and bequeath [insert dollar amount or percent of estate] to the Chi Phi Educational Trust, (tax id#58-6035103) an unincorporated trust organized and existing under the laws of the State of Georgia, or its successor organization. Said Trust is exempt from federal income tax under Section 501(c) (3) of the Internal Revenue Code and contributions to it are deductible under the provisions of federal income, gift and estate tax laws.

Individuals who have made the Chi Phi Educational Trust or their chapter a beneficiary of their last will and testament are asked to provide an attorney's letter or copy of this page from their will so Chi Phi can acknowledge the donor's generosity and properly plan its future.

To learn more or to have a confidential conversation about a planned gift, contact Director of Development Elizabeth Knott at (800) 849-1824 or knott@chphi.org.



Reconnect with CHI PHI

June

June 7-9 Rho Chapter Alumni Association BBQ and open house (www.chiphirho.org/bbq)

June 27-30 148th Chi Phi Congress (www.chiphi.org/congress)

June 27 The Watts Gunn Memorial Golf Tournament (www.chiphi.org/golf)

July

July 24-28 College of Excellence (www.chiphi.org/coe)

July 27 18th Annual Nebraska Chi Phi Golf Outing (www.chiphi.org/events)

August

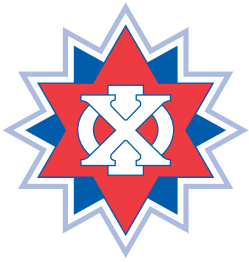
August 31 Iota Chapter gathering (www.chiphiiotaalumni.com)

October

October 4-6 Iota Delta 55th Reunion (www.indianachiphi.com)

Visit www.chiphi.org/calendar regularly for additions and updates for upcoming gatherings of Chi Phi Brothers.

Do you have news or important dates want to share about your Chapter or Alumni Association? Send all relevant information to chphi@chphi.org.



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148th Chi Phi Congress

148th
Congress
Chi Phi Fraternity Baltimore, Maryland

Hosted In

Baltimore, Maryland

Dates

June 27 - 30, 2013

Attire

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and activities are business attire
(coat and tie) events.**



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