

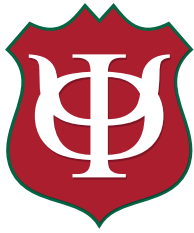
2024 IMPACT REPORT

**TOGETHER, WE'RE
ENSURING THE NEXT
GENERATION IS**

Ready for Life



PHI KAPPA PSI
FOUNDATION

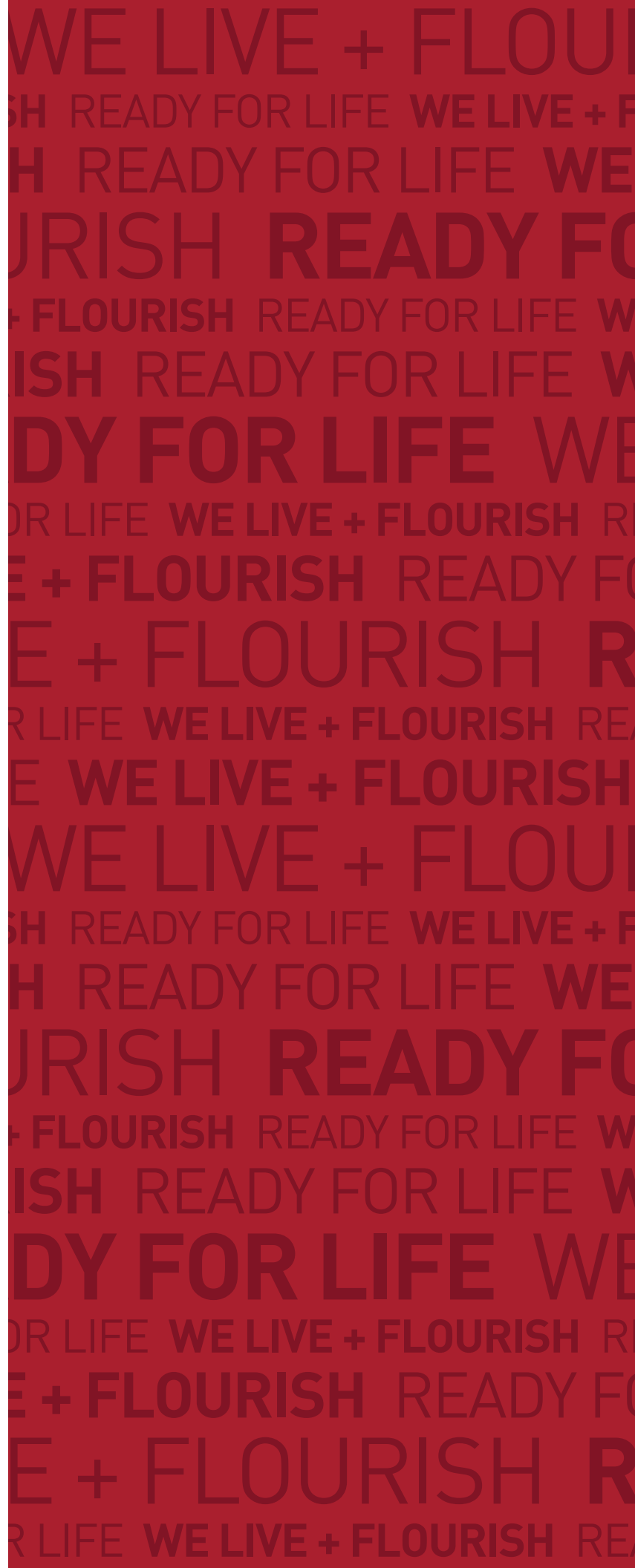


PHI KAPPA PSI FOUNDATION

The mission of the Phi Kappa Psi Foundation is to foster the development of leaders and promote academic excellence in higher education.

THE FOUNDATION'S CORE RESPONSIBILITIES

- **Stewardship and Investment**
Responsibly manage and invest assets to ensure the long-term sustainability and success of our chapters, house corporations, alumni associations, and the national organization.
- **Academic Support**
Champion academic excellence by providing scholarship funding and support resources to undergraduate and graduate students.
- **Leadership and Personal Development**
Foster leadership, citizenship, and a commitment to service that cultivates personal as well as professional growth and meaningful impact.
- **Chapter Housing**
Advance the development and maintenance of clean, safe, and healthy living environments for our members.





“Your participation in this mission has translated into the positive outcomes reported here — successes that are the tip of the iceberg of what’s happening across the Fraternity.”

Letter from the **CHAIRMAN**

Brothers,

A little over ten years ago, I returned from what I jokingly call a “very long sabbatical” from active involvement in Phi Psi. What drew me back was a growing conviction rooted in two truths: First, the next generation needs us — now more than ever. Watching my own college-aged kids navigate today’s landscape has only deepened this belief.

Second, the American fraternity is one of the most powerful, hands-on learning laboratories ever created. And Phi Kappa Psi stands among the very best of them.

Today, many students face mounting challenges — a mental health crisis fueled by academic stress, social media pressure, and profound isolation. In an era bursting with information, students are often left overwhelmed, anxious, and disconnected. While these students struggle, others thrive. A good fraternity experience brings young men together so all can grow and benefit from brotherhood, belonging, and mutual responsibility.

Thankfully, the Phi Psi Foundation is answering these challenges through its unique capacity to unite alumni in support of initiatives that break down barriers to our members’ achievements. **Your participation in this mission has translated into the positive outcomes reported here — successes that are the tip of the iceberg of what’s happening across the Fraternity.**

Our brothers are fortunate, indeed, and I echo their deep gratitude for your passion to prepare members for lifelong success, to support their academic journey, and to proactively ensure their physical and mental well-being.

From the conviction that we must do more, coupled with the Foundation’s strong financial position to serve these growing needs, has emerged an ambitious vision to **give every Phi Psi the resources he needs to succeed.**

Your support tells me that the Creed you once recited with youthful conviction *resonates deeply to this day*. Thank you for fulfilling the Phi Psi ideals as you continue to live out your commitment as *a generous, compassionate, and loyal comrade*.

In the Bond,

A handwritten signature in blue ink that reads “Timothy P. McCourt”.

Timothy P. McCourt Washington '78
Chairman

2024 IMPACT

The Phi Kappa Psi Foundation's impact on member lives continues to expand, driven by the generosity of our members, families, and friends.

With every gift, you make it possible for the Foundation to continue awarding scholarships and fellowships, investing in leadership programming, and providing educational grants that foster positive, values-based living and learning environments. Thank you for investing in the Foundation in 2024.



SCHOLARSHIPS,
FELLOWSHIPS & GRANTS

\$494,141



LEADERSHIP PROGRAMMING
NELSON LEADERSHIP INSTITUTE

\$313,497



HOUSING
EDUCATIONAL AREA GRANTS

\$169,763



PROGRAM
FACILITATION EXPENSES

\$1,108,713

TOTAL 2024 IMPACT

\$2,086,114

FINANCIAL HIGHLIGHTS

FISCAL YEAR 2024

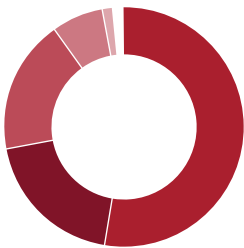
Our commitment to exceptional stewardship means investing your gifts wisely and prioritizing financial transparency.

Despite navigating a volatile market environment in 2024, the Foundation’s diversified investment portfolio produced a strong net investment return of approximately \$7.1 million. Total assets grew to more than \$82 million, with over \$4.2 million allocated to programs, fundraising, and administrative support. The impact of these numbers is reflected in the stories that follow.

Below, we’ve shared the Foundation’s financial highlights for 2024.

TOTAL NET ASSETS

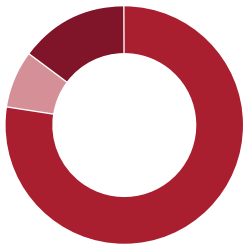
\$81,942,593



TOTAL REVENUES BY SOURCE

\$9,778,902

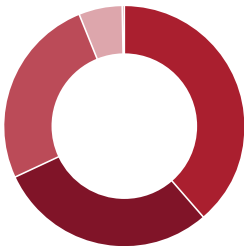
General Investments*	\$5,307,051
Member Support and Other Contributions	\$1,936,168
PKP McMahan Finance Engine LLC Investments*	\$1,809,831
Rental Income (Events, Etc.)	\$712,717
Interest Income on Mortgage Notes Receivable	\$133,401
Miscellaneous Loss	(\$120,266)



TOTAL EXPENSES BY SOURCE

\$4,211,432

Program Expenses	\$2,086,114
General & Administrative Expenses	\$1,078,948
Fundraising Expenses	\$1,046,370



TOTAL CONTRIBUTIONS

\$1,846,156

Chapter Specific/Named Funds	\$715,957
Phi Psi Fund	\$540,646
Chapter Housing Funds	\$480,164
PKP McMahan Finance Engine	\$109,319
Laurel Hall Fund	\$70

**Net of Investment Fees*



FOUNDATION PORTFOLIO PERFORMANCE

As of December 31, 2024

	4th Quarter 2024	Trailing 12 Months	Trailing 3 Years	Trailing 5 Years
Long-Term Pool	-1.97%	9.21%	4.55%	7.92%
Portfolio Benchmark	-2.21%	8.94%	3.00%	6.04%
Market Benchmark	-1.10%	12.91%	4.19%	7.77%
Immediate-Term Pool	1.14%	5.26%	3.76%	2.31%
Mission (Mortgage) Pool	1.38%	5.19%	5.12%	5.24%

INVESTMENT POOLS

Oversight of our financial operations is led by the Board of Trustees and dedicated standing committees that ensure transparency, accountability, and strategic investment of your contributions for maximum impact.

The dollars entrusted to the Foundation are gifted to achieve specific purposes that advance each chapter’s or donor’s charitable intent and further Phi Psi’s vision of inspiring men to strive for their highest intellectual, moral, and spiritual character in order to live productive, honorable, and purposeful lives.

These purposes have different timeframes, and some carry unique restrictions. Some are very short-term, while others are longer and some are perpetual in nature. As a result, the Foundation’s assets are invested in one of five investment pools with asset allocations consistent with these purposes. These allocations are rebalanced to targets when appropriate.

To learn more about the Foundation’s investment strategy and performance, we welcome you to join our semiannual Organizational Update webinars. Scan the QR code to get notified of the next webinar.

Scan the QR code
to sign up today!



NATIONAL & DISTRICT SCHOLARSHIPS

Phi Psi's National & District Scholarships honor brothers who exemplify our values through academic excellence, chapter leadership, and campus involvement. The 2024 recipients recognized here demonstrate outstanding commitment to their studies, chapters, and communities, embodying our motto, *The Great Joy of Serving Others*, through their leadership and service. Hear from two of the National Scholarship recipients in the pages that follow.

Ben King Award

Bryan Wright *Purdue '23*

Founders Graduate Awards

Alec C. Campbell *Illinois '17*

Brett F. Thibodeaux *UL Lafayette '22*

Jerry Nelson Award

Nathanael Smith *Alabama '22*

Mark Stevens USC '81 Undergraduate Awards

Austin Ma *UCLA '23*

Nicholas J. Rohlwing *Illinois '22*

Mark Stevens USC '81 Graduate Awards

Steve Flores *CSULB '10*

Lucas R. Unver *Denison '19*

Phillip M. Cornelius Award

Joseph Wagner *Missouri '22*

Phi Kappa Psi Pride Award

Enzo A. Arcamone *Lycoming '23*

Ralph "Dud" Daniel Leadership Awards

Robert McClosky *Lafayette '23*

Gerald L. Marnell *UCLA '24*

Ruddick C. Lawrence Awards

Carter Rial *Iowa '24*

Ishan Vig *CWRU '23*

Schroeder Family Finance Award

Benjamin Bagby *UMN Twin Cities '22*

Outstanding Solon E. Summerfield Award

Mitchell Joines *Iowa '22*

Outstanding Solon E. Summerfield Runner-up

Zachary Jones *Toledo '21*

Solon E. Summerfield Awards

Dylan Browning *Colorado '23*

Jason Ho *Ball State '22*

David W. Nunn *UMN Twin Cities '21*

Watkins Christian Scholar Awards

Sam Larsen *W&L '22*

William H. Blanning Graduate Awards

Felix T. Celestino *UIC '21*

Jaylen Jude *Valpo '21*

William R. Walker Award

Eric Fredette *Allegheny '23*

Winston Tate Awards

Greyson Gailey *Texas Tech '21*

Alexander Midura *UCLA '22*

District I Awards

John Karwowski *Binghamton '22*

Ari Sarafian *Delaware '23*

Anthony M. S. Valastro *RIT '22*

Matt Wagner *Delaware '22*

District II Awards

Isaac S. Davis *Ashland '21*

Case Mongold *Capital '23*

Nolan Rehrig *W&J '21*

Keygan Yonts *Muskingum '19*

District III Awards

Gino Menard *Toledo '22*

Jackson Miller *Wittenburg '23*

Kathan D. Raju *Indiana '22*

Liam Row *Dayton '22*

District IV Awards

Andrew R. Benecchi *Georgia '19*

Ayush Deshpande *UL Lafayette '21*

Eric W. Lambousy *UL Lafayette '23*

Ben Wechsler *W&L '22*

District V Awards

Ashton J. Lux *Texas '23*

Braden B. Senne *Iowa State '20*

William Thomas *Iowa State '22*

Luke Werthmann *Iowa State '21*

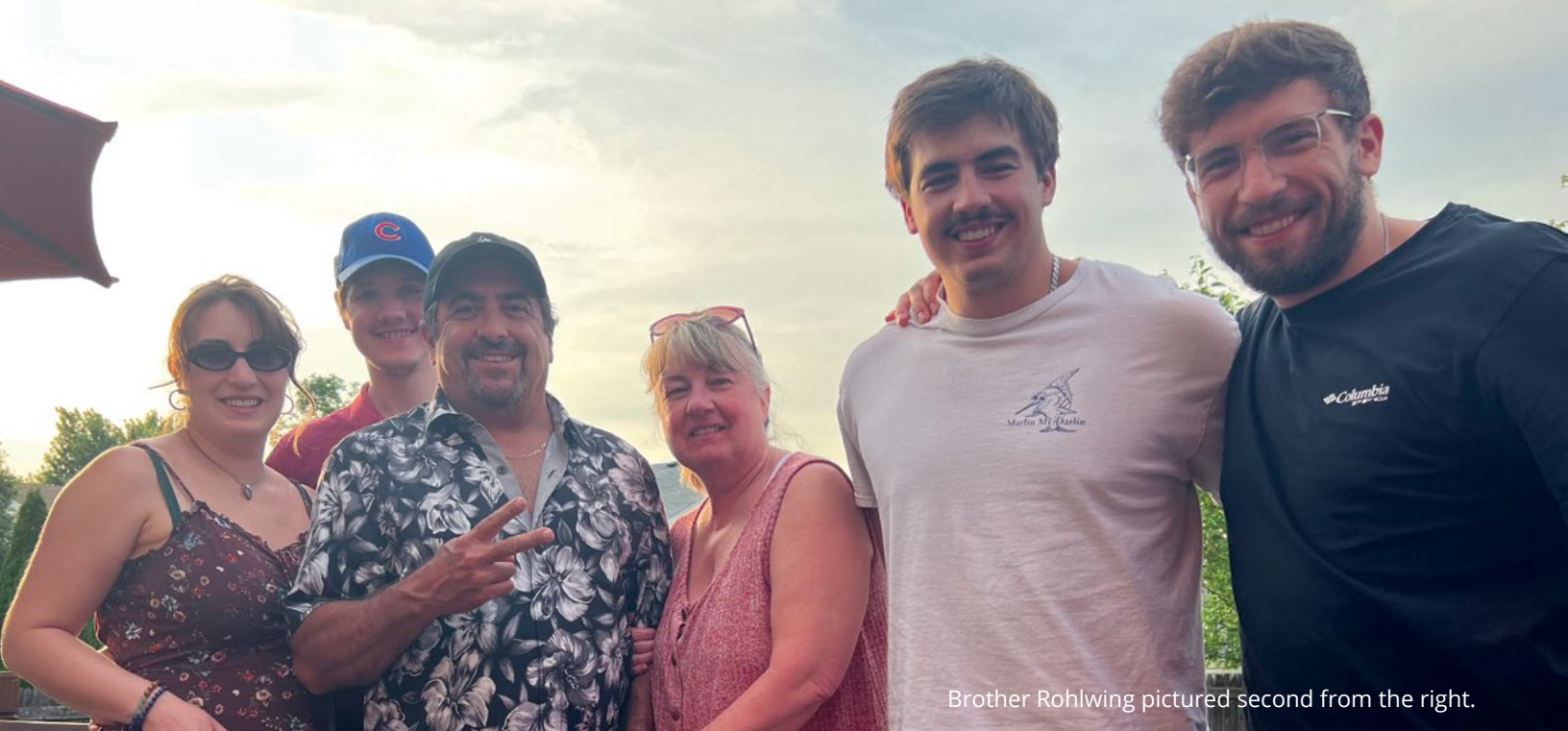
District VI Awards

Paul Fayet-Faber *UCLA '21*

Brady T. Judson *UCLA '22*

Brock Sarsilmaz *UCLA '23*

J. Peter Yang *UCLA '21*



Brother Rohlwing pictured second from the right.

LIVING *the* CREED

TO GIVE AID AND SYMPATHY, A BROTHER TO ALL

When Nicholas Rohlwing *Illinois* '22 reflects on the Creed of Phi Kappa Psi, one line rises above the rest: "To give aid and sympathy to all who are less fortunate."

"For me, that's the heart of it all," said Nick, now a junior at the University of Illinois. "It's the underlying reason I want to become a doctor. I want to make a real difference in my time on earth."

Nick's path hasn't been easy. After suffering a traumatic brain injury in middle school, he endured a grueling, months-long rehabilitation process — an experience that could have left him bitter, but instead sparked a calling. He saw firsthand the power of compassion, watching the unwavering commitment of the doctors and caregivers who helped him heal.

That calling deepened as he watched his mother live with multiple sclerosis, showing strength through adversity every day. These experiences shaped not only Nick's career aspirations but also his character — grounded in empathy, service, and a drive to uplift others.

Nick's story is a powerful reminder that through hardship can come purpose — and that the values of

Phi Psi are not just words, but a way of life. Last year, Brother Rohlwing was awarded the Mark Stevens *USC '81* Undergraduate Scholarship for \$5,000. This National Scholarship award recognized his financial need as well as his achievements and service to *Illinois* Delta and his community.

It's been quite a journey — especially for someone who hadn't initially planned on joining a fraternity.

"I really wanted to focus on school," Nick says. "But after going to a few Phi Psi events, I felt a connection. Meeting other pre-med majors in the chapter has been huge — it's created a sense of community and shared purpose."

For Nick, that sense of purpose goes far beyond academics. One of the most meaningful parts of his Phi Psi experience has been the chance to show up for others.

"Actively contributing to others' well-being is something I strive to embody in my day-to-day life — through service, empathy, and support," he shared. "I believe in the difference one person can make. I want to 'be a brother to all.'"

Nick lives those words in every corner of his life. From volunteering in a church soup kitchen to educating peers about homelessness, assisting individuals with disabilities, and even supporting groundbreaking research to repurpose a tuberculosis medication for antifungal use, Nick's commitment to serving others is both wide-reaching and deeply personal.

What began as a decision to attend a few fraternity events has grown into a brotherhood and a mission — a reflection of the Creed, and a life dedicated to making an impact. "In addition to his academic and research achievements, Nicholas exhibits excellent interpersonal and communication skills," observed one of Brother Rohlwing's professors. "He effectively collaborates with team members ... and demonstrates adaptability in addressing unforeseen challenges. Further, he consistently exhibits kindness and a genuine desire to help others ... I do not doubt that he will continue to excel in academic and professional pursuits."

Chapter Advisor Todd Salen *Illinois '77* wrote that Nick is "deeply devoted to helping other people and works hard to acquire the knowledge he needs to contribute at a higher level."

When it comes to expressing gratitude for the alumni whose generosity made his scholarship possible, Nicholas speaks with both humility and intention.

"I want them to know I plan to pay it forward — to help make the same opportunity possible for another brother one day," he said. "And I hope they can see through my daily commitment to academics and my future career just how seriously I take this gift."

For Nick, the scholarship is more than financial support — it's a vote of confidence that fuels his motivation.

"Their generosity has gone to someone who truly values it. It's easing the burden of financial stress now and helping reduce the debt I'll carry in the future. I'm extremely appreciative."

Nick's words — and his actions — reflect a deep understanding of the ripple effect that support can create. His gratitude isn't just spoken — it's lived, every day.



2024 NATIONAL & DISTRICT SCHOLARSHIPS



562

APPLICATIONS RECEIVED



\$156,800

TOTAL DOLLARS AWARDED



50

TOTAL SCHOLARSHIPS AWARDED



VALUES IN ACTION

THE GREAT JOY OF SERVING OTHERS, A QUEST FOR JUSTICE

Brother Nathanael Smith *Alabama* '22 is a junior at the University of Alabama studying political science.

Phi Psi's motto of *The Great Joy of Serving Others* attracted this pre-law student to the Fraternity. Alongside maintaining a stellar GPA and taking on leadership roles at Alabama Alpha, Nate dedicates 75 or more hours to community service each year — with over 400 service hours contributed in 2023 alone.

His volunteer roles include tutoring elementary students, feeding the hungry, coordinating large university- and community-based service events, connecting nonprofits with volunteers, serving as a museum tour guide, and assisting clients with disabilities who are attending a local therapeutic horsemanship nonprofit.

In 2024, Brother Smith was awarded the Phi Psi Foundation's Jerry Nelson Award, a \$2,500 scholarship

recognizing his high moral standards, entrepreneurial spirit, and commitment to positively influencing his chapter, campus, and community.

He is grateful for the recognition, along with the monetary award that eases the financial burden of paying his way through school.

For Brother Smith the pursuit of a law degree is about far more than personal ambition — it's a calling to serve. "I hope to leverage my academic and leadership achievements, service experience, and strong moral compass to uphold justice and advocate for underserved communities."

Nate's passion for public service law began to take shape during an internship with the Fayette County State Court. "My interests in community service and law intersected there," he explained. "Working under someone who has become a role model, I saw what a judge should be." That experience, paired with his

own outreach efforts in Tuscaloosa, solidified his commitment to making a meaningful impact through the legal system.

Driven by Phi Psi's core values, Nate consistently seeks to foster goodwill and support those around him — both on campus and in the chapter house. "I've tried to build a culture of generosity and compassion," he shared. "I want to create a positive, welcoming environment that inspires others to get involved, to serve, and to lead."

Through his academic excellence, leadership, and dedication to service, Nate is not only preparing for a future in public law — he's already living out Phi Kappa Psi's mission to be a man of honor, compassion, and action. With a spark of ingenuity and a keen entrepreneurial spirit, Nate recently launched a sustainable initiative that gives new life to used sawdust from the University's woodshop. Instead of heading to the landfill, the sawdust is now repurposed as bedding for horse stalls at Therapeutic Riding of Tuscaloosa (TROT), a nonprofit that offers behaviorally oriented therapy through interactions with specially trained horses and instructors.

"This project called for careful planning, strategic negotiation, and the creation of a lasting partnership between the University and TROT," Nate explained. "Bringing it to life has been a major milestone in my professional journey, showing me firsthand how entrepreneurship can drive meaningful success while giving back to the community." Marguerite Malone, Ph.D., serves as clinical director of the equestrian nonprofit where Nate volunteers. "Nate is one of the most dedicated and broadly knowledgeable of those with whom I have worked. He has served as a mentor to youth in our program and as our liaison to the large community service organization at the University of Alabama. Nate endeavors to bring different organizations and populations together in ways that better his community and the global community as a whole."

Chapter Advisor and House Corporation Treasurer Patrick Adcock *Alabama '04* couldn't agree more. "Nate truly embodies the ideals of our Creed," he said. "He likely spends more time serving others than anyone else in the chapter — yet still maintains one of the highest GPAs. He's remarkably organized, deeply involved, and one of the most dedicated undergraduates I've had the honor of working with. His commitment to both our campus and our chapter is unwavering."



2024 CHAPTER SCHOLARSHIPS



\$336,525
TOTAL DOLLARS AWARDED



368
TOTAL SCHOLARSHIPS AWARDED

CLIMBING HIGHER

A PATH TO SERVING OTHERS

Brother Ian Risser *Ohio State '17*, a fourth-year medical student at the University of Toledo Medical School, stumbled upon an exciting opportunity while browsing a Phi Psi e-newsletter last spring. It was there that he discovered the Phi Psi Foundation's Shane Yates Fellowship.

"I thought, 'Hey, I think this applies to me,'" Ian recalled. At the time, he was preparing for his student rotations in orthopedic surgery — an exciting but costly endeavor. With medical school already carrying an annual financial burden of around \$50,000, Ian faced even more expenses for his 12-week rotations at three top-tier orthopedic hospitals across the U.S. From transportation and housing to additional tuition costs, the financial strain was significant. That's when the Phi Psi Foundation's Shane Yates Fellowship caught his eye — offering a potential lifeline during this critical stage of his medical training.

He was awarded the Yates Fellowship in the amount of \$1,500 in time to attend the first of those extraordinary experiences.

Ian's passion for adaptive sports and the Special Olympics played a major role in shaping his academic journey. When he enrolled at The Ohio State University in late 2016, he chose to pursue the challenging field of biomedical engineering with a clear goal in mind: helping people overcome their challenges so they could engage in the activities they love.

Initially, Greek life wasn't part of his college plan, but that changed during the spring recruitment of 2017. After meeting several accomplished upperclassmen from Ohio Delta, Ian saw firsthand the professional drive and camaraderie within Phi Kappa Psi. Inspired by their success and character, he made the decision to join — a choice that would shape both his college experience and his future career.

"Adam Steinle was the chapter president at the time — a biomedical engineering major and one of the smartest people I've ever met," Ian recalled. "Being in Phi Psi gave me mentors and career exploration opportunities I wouldn't have otherwise had."

By the end of his sophomore year, Ian's Phi Psi experience had already opened doors. He had the opportunity to attend the Nelson Leadership Academy's PIVOT program in Orlando, where he connected with remarkable individuals from across the country. "That experience truly broadened my perspective — not just on my own potential, but on the depth and impact of the Phi Psi brotherhood."

Brother Risser reflects on his engineering background as a defining part of his journey. "The major pushed students, like me, out of their comfort zones and forced me to expand my problem-solving skills," he said. That love for tackling complex challenges ultimately guided him toward orthopedic surgery.

"While studying physiology and preparing for the MCAT, I realized just how intricate the human body is," Ian shared. "I wanted to know more." His curiosity and drive paid off — he graduated magna cum laude from Ohio State and went on to earn invitations to two prestigious honor societies during medical school, further cementing his path toward a career dedicated to solving complex medical challenges.

Why orthopedic surgery? "I believe the ability to live one's life to the fullest is centered around the ability to





Brother Risser pictured in the middle of the front row.

move and complete activities. During my rotations, I worked in some of the country's most advanced trauma centers treating the worst injuries. I saw the dedication and skill of ER doctors and surgeons at work. As a physician and a Phi Psi, I want to continue learning — and to do as our Creed says, to give aid and sympathy to all who are less fortunate."

During medical school, Ian leveraged some of the leadership skills he gained at Ohio Delta to co-create the nonprofit organization Northwest Ohio Adaptive Climbing. Today, he serves as its president. The organization is dedicated to empowering individuals with intellectual and physical disabilities through the transformative experience of rock climbing. "We believe that every person, regardless of ability, deserves the opportunity to embrace the thrill of ascending to new heights and discovering their resilience."

Ian expresses his deep gratitude to the alumni who made his fellowship possible and to the Phi Psi Foundation for making grants like this known to brothers of all ages. "Honestly, if I hadn't read that alumni email, this wouldn't have been on my radar at all. Receiving the Shane Yates award has removed some of the additional financial burden of my rotations, allowing me to focus more on excelling as a student, future resident, and coworker. I'm very thankful for those alumni supporting my professional endeavors and for allowing me to become someone who can give back to others."

2024 NATIONAL FELLOWSHIPS



\$4,802

TOTAL DOLLARS AWARDED



5

TOTAL FELLOWSHIPS AWARDED

2024 RECIPIENTS

Terrence "Terry" G. Harper Fellowship
Joshua Uhl *Brandeis '22*

Shane Yates Fellowships

Ryan Ashby *UC Berkeley '19*

Jake A. Johnson *Butler '22*

Ian B. Risser *Ohio State '17*

Charlie Schmitt *Allegheny '22*

CHAPTER PERFORMANCE

FISCAL YEAR 2024

As Phi Psi's Community Foundation, the Foundation serves as the bridge connecting our rich history with our promising future, stewarding resources that directly impact the lives of current undergraduates while preserving the potential for future chapter revivals. The data presented here reflects the full scope of our community — from thriving active chapters and emerging colonies to closed chapters whose preserved funds stand ready to support the brotherhood's return to those campuses. This fiscal year overview demonstrates the tangible ways our Foundation transforms brotherhood into opportunity through strategic management of net assets, targeted distribution of chapter funds to active communities, and expanded impact grant opportunities including scholarships, leadership development programming, and housing grants from designated chapter funds, ensuring that the values and opportunities that define our organization remain accessible to current and future generations.

CHAPTER	LIVING ALUMNI	UNDERGRADUATE MEMBERS	CHAPTER SCHOLARSHIPS	NET ASSETS	CHAPTER IMPACT GRANTS
ALABAMA ALPHA (ALABAMA)	988	191	-	\$54,496	-
ALABAMA BETA (AUBURN) ^x	213	-	-	\$3,398	-
ALABAMA GAMMA (HUNTSVILLE)	133	31	-	\$21,001	-
ARIZONA ALPHA (ARIZONA) ^x	632	-	-	\$309,517	-
ARIZONA BETA (ASU)	857	108	-	\$75,851	-
CALIFORNIA BETA (STANFORD)	1065	61	-	\$189,334	-
CALIFORNIA DELTA (USC) ^x	1667	-	-	\$2,426,791	\$72,900*
CALIFORNIA EPSILON (UCLA)	1503	112	6	\$2,058,051	\$15,300
CALIFORNIA ETA (CAL POLY)	1036	94	-	\$110,738	-
CALIFORNIA GAMMA (UC BERKELEY)	782	78	-	\$157,493	-
CALIFORNIA IOTA (UC DAVIS) ^x	301	-	-	\$24,022	-
CALIFORNIA KAPPA (UC IRVINE)	860	15	-	\$96,577	-
CALIFORNIA LAMBDA (SAN DIEGO STATE) ^x	846	-	23	\$303,866	\$7,881
CALIFORNIA MU (OCCIDENTAL) ^x	238	-	-	\$7,325	-
CALIFORNIA NU (UC RIVERSIDE) ^x	359	-	-	\$35,795	-
CALIFORNIA THETA (CSUN)	431	51	-	\$40,348	-
CALIFORNIA XI (LONG BEACH) ^x	142	-	-	\$30,500	-
CALIFORNIA ZETA (UC SANTA BARBARA) ▲	504	26	-	\$22,030	-
CLEMSON COLONY (CLEMSON) ▲	-	61	-	\$20,439	-
COLORADO ALPHA (COLORADO)	1240	139	2	\$313,236	\$3,000
DELAWARE ALPHA (DELAWARE)	339	50	-	\$29,000	-
DISTRICT OF COLUMBIA ALPHA (GW) ^x	501	-	-	\$5,869	-
FLORIDA ALPHA (FSU)	757	46	-	\$32,514	-
GEORGIA ALPHA (GEORGIA) ^x	525	-	-	\$39,558	\$22,970
GEORGIA BETA (GEORGIA TECH)	180	15	-	\$54,784	-
ILLINOIS ALPHA (NORTHWESTERN) ^x	1306	-	-	\$32,522	-

▲ COLONY ^x CLOSED CHAPTER

Top 5 Chapters
BY LIVING ALUMNI

Indiana Beta 2,225
Texas Alpha 2,053
Illinois Delta 2,004

Kansas Alpha 1,776
West Virginia Alpha 1,707

CHAPTER	LIVING ALUMNI	UNDERGRADUATE MEMBERS	CHAPTER SCHOLARSHIPS	NET ASSETS	CHAPTER IMPACT GRANTS
ILLINOIS DELTA (ILLINOIS)	2004	125	1	\$202,406	\$17,349
ILLINOIS EPSILON (ILLINOIS STATE)	423	53	3	\$78,483	\$2,000
ILLINOIS ETA (SIUE)	377	20	-	\$41,424	-
ILLINOIS IOTA (NORTHERN ILLINOIS)	326	55	-	\$29,210	-
ILLINOIS THETA (UIC)	294	40	-	\$49,082	-
ILLINOIS ZETA (DEPAUL)	549	27	-	\$93,684	-
INDIANA ALPHA (DEPAUW)	1355	79	-	\$470,642	-
INDIANA BETA (INDIANA)	2225	119	17	\$334,074	\$4,250
INDIANA DELTA (PURDUE)	1586	115	-	\$437,020	-
INDIANA EPSILON (VALPO)	1261	41	1	\$300,634	\$61,241
INDIANA ETA (INDIANA STATE)	369	16	-	\$45,411	-
INDIANA GAMMA (WABASH)	1110	53	13	\$102,234	\$3,250
INDIANA IOTA (BALL STATE)	227	35	2	\$25,250	\$500
INDIANA THETA (IU INDY) ^x	177	-	-	\$31,594	-
INDIANA ZETA (BUTLER)	845	31	-	\$124,988	-
IOWA ALPHA (IOWA)	1441	202	6	\$134,815	\$5,000

Top 5 Chapters
BY UNDERGRADUATE MEMBERS

Mississippi Alpha 313
Iowa Alpha 202
Alabama Alpha 191

Texas Alpha 180
Missouri Alpha 162

IOWA BETA (IOWA STATE)	989	118	8	\$1,537,534	\$5,750
KANSAS ALPHA (KANSAS)	1776	108	-	\$87,119	-
KENTUCKY BETA (KENTUCKY)	415	28	9	\$321,418	\$5,500
LOUISIANA ALPHA (LSU)	1057	73	-	\$179,894	-
LOUISIANA BETA (UL LAFAYETTE)	330	58	1	\$51,631	\$975
LOUISIANA GAMMA (LOYOLA) ^x	408	-	-	\$23,621	-
MARYLAND ALPHA (JOHNS HOPKINS)	1051	65	18	\$520,836	\$17,000
MARYLAND DELTA (TOWSON)	48	28	-	\$32,548	-
MARYLAND GAMMA (MARYLAND) ^x	251	-	-	\$7,076	-
MASSACHUSETTS BETA (BRANDEIS)	436	35	2	\$81,218	\$750
MICHIGAN ALPHA (MICHIGAN) ^x	1222	-	-	\$173,745	-
MICHIGAN BETA (MICHIGAN STATE)	971	99	3	\$581,014	\$4,500
MINNESOTA BETA (UMN TWIN CITIES)	1052	99	18	\$436,495	\$15,750
MINNESOTA DELTA (UMN DULUTH)	180	17	-	\$66,697	-
MINNESOTA GAMMA (MNSU MANKATO)	506	36	-	\$35,276	-
MISSISSIPPI ALPHA (OLE MISS)	1577	313	4	\$414,449	\$3,241
MISSOURI ALPHA (MISSOURI)	1254	162	10	\$239,132	\$3,000
MIT COLONY (MIT) ▲	-	40	-	-	-

▲ COLONY ^x CLOSED CHAPTER

Top 5 Chapters BY SCHOLARSHIPS

Pennsylvania Theta 35
Tennessee Delta 27
Texas Alpha 24

California Lambda 23
Maryland Alpha 18

CHAPTER	LIVING ALUMNI	UNDERGRADUATE MEMBERS	CHAPTER SCHOLARSHIPS	NET ASSETS	CHAPTER IMPACT GRANTS
NEBRASKA ALPHA (NEBRASKA)	1253	48	5	\$397,081	\$14,011
NEBRASKA BETA (CREIGHTON) ^x	1379	-	-	\$46,230	-
NEW JERSEY BETA (MONMOUTH)	450	3	-	\$30,238	-
NEW JERSEY DELTA (TCNJ)	564	72	3	\$45,219	\$750
NEW JERSEY EPSILON (ROWAN)	365	40	-	\$52,990	-
NEW JERSEY GAMMA (RUTGERS)	440	23	-	\$29,448	-
NEW YORK ALPHA (CORNELL) ^x	1371	-	-	\$90,531	-
NEW YORK BETA (SYRACUSE) ^x	1284	-	1	\$183,921	\$5,000
NEW YORK ETA (BUFFALO) ^x	651	-	-	\$128,967	-
NEW YORK IOTA (BINGHAMTON)	303	82	-	\$23,504	-
NEW YORK KAPPA (SUNY ONEONTA)	341	28	1	\$144,235	\$1,350
NEW YORK THETA (RIT)	485	45	7	\$162,071	\$2,450
NORTH CAROLINA BETA (EAST CAROLINA) ^x	267	-	-	\$15,782	-
OHIO ALPHA (OHIO WESLEYAN) ^x	1009	-	-	\$46,575	-
OHIO BETA (WITTENBERG)	1125	48	-	\$411,146	-
OHIO DELTA (OHIO STATE) [▲]	1664	29	12	\$2,575,689	\$123,318

Top 5 Chapters BY NET ASSETS

Tennessee Delta \$3,817,985
Ohio Delta \$2,575,689
California Delta \$2,426,791

California Epsilon \$2,058,051
Iowa Beta \$1,537,534

OHIO EPSILON (CWRU)	937	45	16	\$310,532	\$10,600
OHIO ETA (TOLEDO)	1038	30	-	\$37,331	-
OHIO IOTA (AKRON)	334	29	-	\$33,515	-
OHIO KAPPA (KENT STATE) ^x	94	-	-	\$167	-
OHIO LAMBDA (MIAMI)	1314	39	8	\$157,847	\$2,880
OHIO MU (DAYTON)	369	52	-	\$100,081	-
OHIO NU (OHIO)	415	110	-	\$25,114	-
OHIO OMICRON (MUSKINGUM)	162	21	-	\$24,354	-
OHIO PI (DENISON)	83	58	-	\$20,690	-
OHIO THETA (ASHLAND)	811	27	2	\$102,570	\$1,458
OHIO XI (CAPITAL)	237	23	-	\$46,757	-
OHIO ZETA (BOWLING GREEN) ^x	681	-	-	\$49,283	-
OKLAHOMA ALPHA (OKLAHOMA)	947	19	-	\$89,008	-
OREGON ALPHA (OREGON)	1210	46	3	\$251,270	\$5,500
OREGON BETA (OREGON STATE)	918	123	9	\$258,481	\$20,229
PENNSYLVANIA ALPHA (W&J)	844	29	-	\$34,750	-
PENNSYLVANIA BETA (ALLEGHENY)	1020	17	16	\$224,177	\$6,450
PENNSYLVANIA EPSILON (GETTYSBURG) ^x	899	-	-	\$105,820	\$2,942

▲ COLONY ^x CLOSED CHAPTER

Top 5 Chapters BY IMPACT GRANTS

Ohio Delta\$123,318
California Delta\$72,900
Indiana Epsilon\$61,241

Texas Alpha\$30,403
Georgia Alpha\$22,970

CHAPTER	LIVING ALUMNI	UNDERGRADUATE MEMBERS	CHAPTER SCHOLARSHIPS	NET ASSETS	CHAPTER IMPACT GRANTS
PENNSYLVANIA EPSILON (GETTYSBURG) ^x	899	-	-	\$105,820	\$2,942
PENNSYLVANIA ETA (F&M)	797	28	1	\$61,679	\$250
PENNSYLVANIA GAMMA (BUCKNELL) ^x	1275	-	-	\$75,848	-
PENNSYLVANIA IOTA (PENN)	800	75	-	\$149,179	-
PENNSYLVANIA LAMBDA (PENN STATE)	1085	106	4	\$248,909	\$1,399
PENNSYLVANIA NU (IUP) ^x	781	-	-	\$40,186	-
PENNSYLVANIA PHI (LYCOMING)	161	4	-	\$27,087	-
PENNSYLVANIA RHO (YORK)	351	7	-	\$32,001	-
PENNSYLVANIA SIGMA (SAINT JOSEPH'S)	262	31	-	\$26,368	-
PENNSYLVANIA THETA (LAFAYETTE)	1103	61	35	\$807,460	\$16,150
PENNSYLVANIA UPSILON (DREXEL) ^x	271	24	-	\$29,935	-
PENNSYLVANIA XI (EDINBORO) ^x	271	-	-	\$3,068	-
PENNSYLVANIA ZETA (DICKINSON) ^x	662	-	-	\$10	-
RHODE ISLAND ALPHA (BROWN) ^x	882	-	-	\$38,278	-
RHODE ISLAND BETA (URI)	1210	123	-	\$165,355	-
SOUTH CAROLINA ALPHA (SOUTH CAROLINA) ▲	159	10	-	\$40,968	-
TENNESSEE DELTA (VANDERBILT)	1208	71	27	\$3,817,985	\$19,394
TENNESSEE EPSILON (TENNESSEE)	492	129	-	\$92,329	-
TEXAS ALPHA (TEXAS)	2053	180	24	\$823,997	\$30,403
TEXAS BETA (TEXAS TECH)	1206	135	8	\$160,373	\$6,989
TEXAS EPSILON (SFA)	156	18	-	\$37,709	-
TEXAS ETA (TEXAS A&M)	67	34	-	\$20,439	-
TEXAS GAMMA (TEXAS STATE) ^x	593	-	-	\$39,159	\$371
TEXAS ZETA (HOUSTON CHRISTIAN)	167	10	-	\$30,364	-
UTAH COLONY (UTAH) ^x	-	-	-	\$20,439	-
VIRGINIA ALPHA (VIRGINIA)	911	82	-	\$365,435	-
VIRGINIA BETA (W&L)	980	66	7	\$346,378	\$11,650
VIRGINIA ETA (VCU) ▲	193	14	-	\$25,011	-
VIRGINIA THETA (JMU)	183	99	-	\$21,314	-
VIRGINIA ZETA (VIRGINIA TECH)	571	157	-	\$35,776	-
WASHINGTON ALPHA (WASHINGTON)	1306	62	15	\$872,841	\$16,700
WEST VIRGINIA ALPHA (WVU)	1707	111	-	\$798,565	-
WISCONSIN GAMMA (BELOIT)	872	25	17	\$125,090	\$4,250

Totals

93,496 6,116 368 \$29,420,618 \$576,601

▲ COLONY ^x CLOSED CHAPTER

* If a closed chapter fails to begin the recolonization process a year after being closed, it is the Foundation's policy to use the 4.5% Spending Policy to fund regional or national scholarship and leadership grants. The chapter's fund remains invested and returns to the chapter's full use once recolonization commences.

ADDRESSING CRITICAL NEED

TRANSFORMING YOUNG PHI PSIS INTO CONFIDENT LEADERS

In a recent survey of 1,000 business managers, about half say that today's workforce candidates lack the overall professionalism needed to be successful in their roles.

Specific findings included:

81% say recent college graduates need workplace etiquette training.

56% contend this demographic is somewhat or highly incompetent at taking constructive criticism.

40%-48% cite incompetence in resolving conflicts, arriving on time, separating their work and home lives, dressing professionally, and exercising common sense in the workplace.

Generous alumni are helping Phi Psi address these concerns in a powerful effort to build leadership and interpersonal skills among its youngest members.

The *Launch* program, piloted in the fall of 2024, welcomed 31 Phi Psis from five chapters to Camp Tecumseh in Brookston, Indiana, for a multi-faceted leadership learning weekend.

Guided by facilitators, staff, and alumni volunteers, participants spent three days developing leadership skills and making new connections with peers from nearby Phi Psi chapters.

The multi-day *Launch* program was designed to inspire impact through dynamic learning, reflection, and connection. With a mix of small-group conversations and large-group discussions, participants were immersed in high-energy, rapid-fire lessons from the moment they arrived.

Here's how the transformative journey unfolded:

DAY 1: LAYING THE FOUNDATION

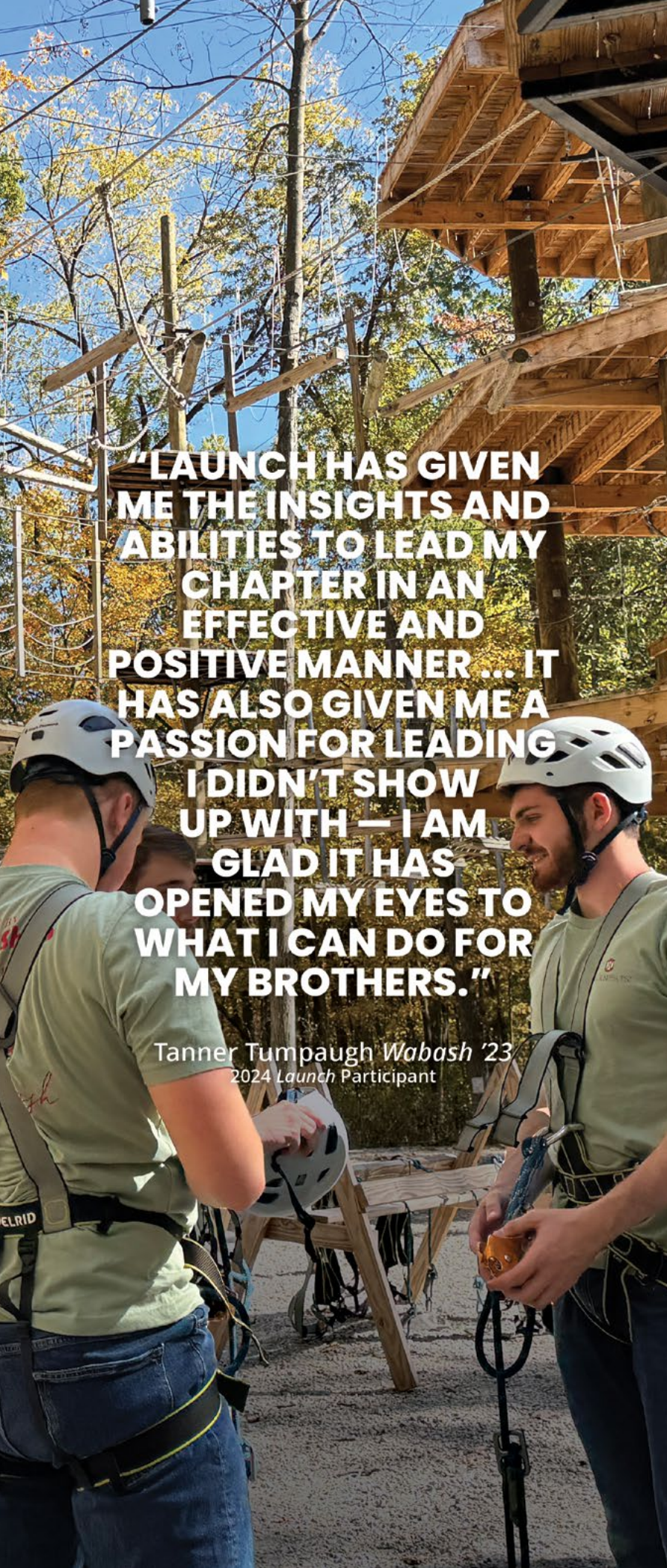
The program kicked off by introducing *Launch's* structure and goals, setting the tone for a weekend of growth. Participants discovered the Adaptive Leadership Model and gained insight into their unique leadership styles using the True Colors Assessment. The day wrapped with honest conversations about identifying and tackling chapter challenges, managing personal wellness, and preparing for the real-world demands of leadership.

DAY 2: LEADING WITH PURPOSE

Day two focused on practical leadership skills. Participants explored how to build buy-in, manage conflict, and lead through values. They also learned to identify key stakeholders, celebrate progress, and inspire others. The day culminated in a high ropes course — an exciting, hands-on team-building experience that tested their communication, trust, and resilience in the great outdoors.

DAY 3: TURNING INSIGHT INTO ACTION

The final day focused on bringing it all together. Through time management exercises and goal-setting sessions, participants developed personal blueprints outlining their future academic, fraternal, professional, and personal ambitions. The weekend closed with a challenge: to take the tools they'd gained and drive positive change in their chapters, on campus, and in their communities.

A photograph of two men wearing helmets and safety harnesses, standing at a ropes course. They are looking at each other and smiling. The background shows wooden structures and trees with autumn foliage.

"LAUNCH HAS GIVEN ME THE INSIGHTS AND ABILITIES TO LEAD MY CHAPTER IN AN EFFECTIVE AND POSITIVE MANNER ... IT HAS ALSO GIVEN ME A PASSION FOR LEADING I DIDN'T SHOW UP WITH — I AM GLAD IT HAS OPENED MY EYES TO WHAT I CAN DO FOR MY BROTHERS."

Tanner Tumpaugh Wabash '23
2024 Launch Participant

Feedback from surveyed participants was resoundingly positive. Many called it one of the most enriching leadership opportunities they've experienced and strongly recommended that it continue.

"The discussions and lessons were greatly valuable."

— Lucas Raker Butler '23

"The sessions on conflict and resolution couldn't have come at a better time. They gave me practical tools and a fresh perspective to navigate the challenges I've been facing in my chapter — and I'm walking away feeling more confident and equipped to lead."

— Braylon Collins Ball State '23

"Launch has given me the insights and abilities to lead my chapter in an effective and positive manner ... it has also given me a passion for leading I didn't show up with — I am glad it has opened my eyes to what I can do for my brothers."

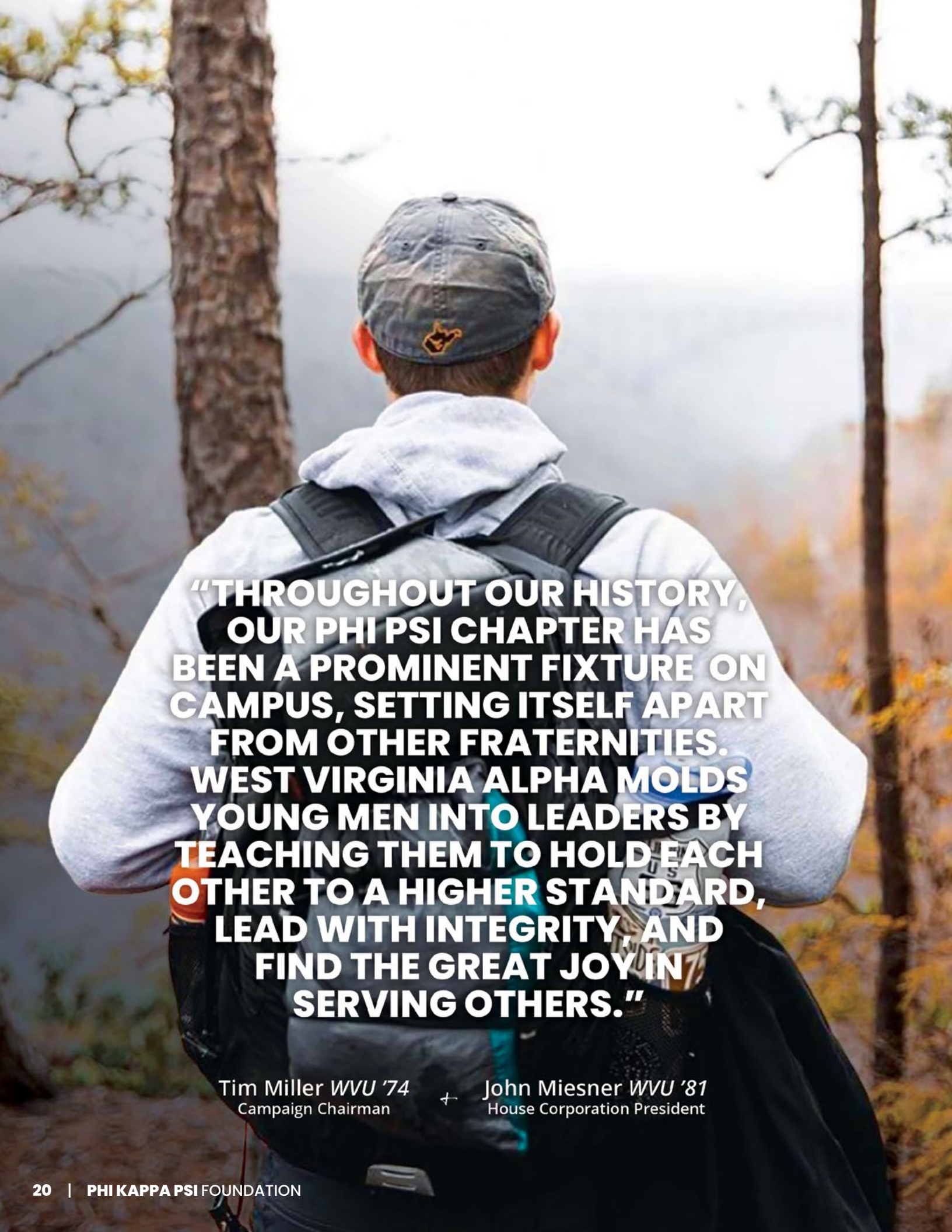
— Tanner Tumpaugh Wabash '23

"I truly believe this program should be a must for every Phi Psi. It gives brothers the chance to discover what it means to be an effective leader and how they can drive meaningful change in their chapters."

— Michael Cruzado Wabash '23

Expanding the Foundation's educational offerings is possible only with broad-based alumni support. The Fraternity continues to prioritize leadership and learning as essential pillars of every member's lifelong journey. Since the program's conclusion, 65% of attendees have taken on a leadership role within their chapter.

These programs aren't just nice-to-have — they're essential. Initiatives like these are critical to ensuring today's brothers graduate with more than a degree. They leave college equipped with the interpersonal and professional skills they'll rely on for a lifetime.



**"THROUGHOUT OUR HISTORY,
OUR PHI PSI CHAPTER HAS
BEEN A PROMINENT FIXTURE ON
CAMPUS, SETTING ITSELF APART
FROM OTHER FRATERNITIES.
WEST VIRGINIA ALPHA MOLDS
YOUNG MEN INTO LEADERS BY
TEACHING THEM TO HOLD EACH
OTHER TO A HIGHER STANDARD,
LEAD WITH INTEGRITY, AND
FIND THE GREAT JOY IN
SERVING OTHERS."**

Tim Miller WVU '74
Campaign Chairman



John Miesner WVU '81
House Corporation President

FORGING *the* FUTURE

LIVE EVER. DIE NEVER. A *STRONGER* TOMORROW.

Leading with the Fraternity's beloved and powerful battle cry, alumni leaders at Phi Psi's West Virginia Alpha Chapter launched a historic campaign to ensure sustained excellence in the post-pandemic era.

Their goal? To position the chapter's housing and educational funds for long-term success, making it the most resourced chapter on the West Virginia University campus.

With chapter leadership typically consisting wholly of volunteers, major fundraising initiatives can seem daunting, to say the least. However, the Phi Kappa Psi Foundation Chapter Development Services team was a pivotal partner, providing integral planning and execution resources to help ensure the process. For West Virginia Alpha, the Phi Psi Foundation served as counsel and communications lead for the campaign, managing all aspects from start to finish.

West Virginia Alpha was the University's first fraternity. It has enjoyed a long and storied history, as past University President E. Gordon Gee noted in the campaign case statement:

"Since 1890, Phi Kappa Psi has been a stalwart member of the Greek system at this University ... providing a residence for brothers while instilling lifelong bonds of friendship and loyalty ... [You] now embark on a campaign to meet both the changing needs of the chapter residence and the financial challenges of many of its undergraduate students."

"This Fraternity has always been about attracting the best and brightest," noted Campaign Chairman Tim Miller *WVU '74*. "If we want to get those people, it requires having a modern facility, a place where our brothers can gather — a place to call home. We must become ever more relevant and resilient."

Final results were announced in January 2025, with 152 donors making cash gifts and pledges totaling just over \$1 million to ensure a stronger tomorrow.

The influx of new resources comes at a pivotal time. Greek-letter organizations must evolve to meet

members' growing needs in an age of increasing complexities, competition, and challenges across the campus landscape. As alumnus Alex Greenberg *WVU '07* noted, "Colleges across the country are revamping what it means to be in a fraternity. The old model was not sustainable. We have a unique opportunity to lead by example — demonstrating what it means to be a true fraternity by prioritizing scholarship, character, and the values of a gentleman."

Former National Phi Kappa Psi Fraternity President David Woodrum *WVU '61* noted that the fraternal mission is complementary to that of the college. "The Fraternity is subordinate to the University. We're not equal to or better than. We want to emphasize scholarship, and we want to be able to support students who are scholars."

Facility improvements will provide each student member with a safe environment to learn and thrive in their educational experience. A new sustainable revenue model will also strengthen the chapter and help retain some members who otherwise may be unable to meet the financial obligations of their education. Academic success and retention are goals for all student Phi Psis.

WVU Board of Governors member Rick Pill *WVU '70* offered his encouragement. "The money will be used properly to help other people. There are a lot of great organizations where you can donate your money. [Phi Kappa Psi] will help people, and you've been there. You need to help others just like the people before us helped us."

To learn more about how the Foundation team can support your chapters fundraising needs, to please contact Lee Fuller, Vice President of Development, at lgf@pkpfoundation.org or 317-275-3400.



A LEGACY OF GRATITUDE

BROTHERHOOD INSPIRING GENEROSITY

When Wes Schaub *Toledo '80* came to the largely commuter campus of the University of Toledo in 1979, he was eager to get involved in Greek life. Hailing from North Canton, Ohio, Brother Schaub said he looked at other groups but felt most comfortable with the brothers of Phi Kappa Psi.

"I held a variety of offices as an undergraduate, which ended up encouraging me to get involved in student government, the Interfraternal Council, and other organizations on campus."

After he graduated in 1984 with a degree in architectural history, he took what he called "a hiatus" from his involvement with the brotherhood. "I maintained some chapter friendships," he said, "but I really didn't think about doing anything beyond that."

Wes pursued a graduate degree in higher education and then served as Director of Greek Life at Case Western Reserve University (CWRU). "In the mid-1990s, I was asked by Phi Psi to get involved in what was then the Woodrow Wilson Leadership School. By then, I

felt it was my duty to give back. I volunteered for a couple of years, taking up the challenge of helping our younger brothers improve their life skills. That got me re-engaged at the national and local levels."

Remembering when he received a Phi Psi National Scholarship during his Ohio Eta undergraduate days, Brother Schaub began making regular gifts to the Phi Kappa Psi Foundation. "Scholarships are important. I remember how much that support meant then. It's still important."

Brother Schaub credits Phi Kappa Psi for guiding him toward the fulfilling career he enjoys today. As a way of giving back, he recently included the Phi Psi Foundation in his will, joining the Foundation's Summerfield Society and ensuring future generations of scholars benefit from his generosity.

"A Phi Psi email introduced me to the idea of creating a free will online. It's something many people put off, but I've reached a point where I need to decide what happens to my legacy. Using the FreeWill program made the process simple. Without Phi Psi, I wouldn't

have found the career path that shaped my life. That's why supporting the Foundation was an easy choice — it's always been one of the organizations closest to my heart."

Wes is adding to his Phi Psi legacy by leaving the Foundation his extensive collection of Greek memorabilia, including letters from Phi Psi founders and hand-painted steins. "I also have around 2,000 fraternity badges. Many are from Phi Psi, but there are also others. A most interesting item is a photo yearbook that belonged to a Phi Psi in the 1880s. It is filled with wallet-size photos the member collected from friends that year."

In his current role as a chapter advisor at CWRU, Brother Schaub uses the Phi Psi Creed to encourage young men to think more deeply about their lives.

"Our founding principles are still relevant, still important. I often ask young brothers to reflect on what various lines from our Creed mean for them in their lives — loyalty to the brotherhood and to the university, for instance. I try to get them to translate

those ideals into meaningful actions. I also try to help them realize that being part of any fraternity represents being part of ALL fraternities. Collectively, we have an obligation to present ourselves in ways that bring respect to our individual organizations and to the larger Greek world."

How would he encourage fellow alumni to consider what their fraternal legacy will be? "I would say if you had a positive experience, one memorable enough to keep you involved, that giving back in this way is a good way to thank the organization for its influence in your life. When you join a fraternity, even if you don't mean for it to influence who you are as a person, it still does.

"To acknowledge all you've gained by providing for its future existence is a good thing."

Brother Wes Schaub has served as an academic advisor since 2017 and currently holds the position of Associate Dean at Case Western Reserve University. He is a member of the Fraternity's Order of the S.C. and volunteers his time and expertise in service to Phi Kappa Psi's Ohio Epsilon Chapter.





CREATING A LEGACY

"I wish to make possible a college course for a number of worthy boys," wrote Solon E. Summerfield *Kansas 1899*, "to aid youth to prepare for useful living."

During his undergraduate years, Brother Summerfield was often thought of as a young man who never bothered his teachers and never gave them cause to bother him in return. He was a reserved man, and certainly surprised his Phi Psi brothers when he later became one of the Fraternity's greatest benefactors. Like so many alumni, he was proud of his Phi Psi experience at the University of Kansas and later remembered the brotherhood through a legacy estate gift. Summerfield felt Phi Psi was one of the major reasons for his later success in the business world.

Brother Summerfield's success would come a few short years later in the early 1900s, a time when silk stockings were becoming a popular fashion accessory. Summerfield decided to stake his future on this fashion staple. His hard work and entrepreneurial spirit led to the establishment of the Gotham Silk Hosiery Company. Now, even after his death, his legacy profoundly impacts the lives of undergraduate Phi Psis.



Phi Kappa Psi invites you to incorporate the Fraternity's values of intellect, morality, spirituality, and loyalty into your legacy by including the Foundation in your estate plan. We've made it easy to create an estate plan with our partner, FreeWill. FreeWill walks you through writing a legally valid will or trust online and makes it easy to include the Foundation in your estate plan. Your planned gift supports the brotherhood. FreeWill's Bequest Tool even allows you to specify how you'd like your bequest to be used. Learn more and get started today by scanning the QR Code or by visiting freewill.com/pkpfoundation.

SUMMERFIELD SOCIETY

The Summerfield Society honors those who strengthen the future of Phi Kappa Psi through a planned gift commitment. Members of the Summerfield Society recognize the need for the Foundation to build long-range financial stability by including the organization in their estate plans with instruments such as life insurance, will bequests, annuities, and trusts. For many alumni, this is the easiest way to make a significant gift that allows them to impact the lives of generations of Phi Psis to come. Below is a listing of brothers who have notified the Foundation of their planned gift commitment.

Donald A. Adams *UCLA* '47 †
Michael L. Adams *UC Irvine* '01
Kent E. Agness *Indiana* '69
Alyssa Anderson *Friend of Phi Psi*
Spencer J. Anderson *Iowa* '06
Anonymous Donor *Friend of Phi Psi*
David L. Anthony *Iowa State* '54
Myra Anthony *Friend of Phi Psi*
Wayne R. Baker *Purdue* '83
Robert W. Bartlett *UMN Twin Cities* '46 †
William M. Batten *Ohio State* '29 †
Gail Belt *Friend of Phi Psi*
Gerald A. Belt *UCLA* '56
Charles D. Binning *Gettysburg* '37 (*Penn State* '38) †
Robert B. Bird *WVU* '73
William M. Black *Ohio State* '50 †
Robert L. Bland Jr. *WVU* 1924 †
William H. Blanning III *Dickinson* '37 †
Robert O. Blecken *Washington* '47 †
Frederick D. Bornman *Dartmouth* 1918 †
William A. Bowers III *URI* '66 †
Benjamin J. Bowman *UMN Twin Cities* '99
James D. Boyle *Washington* '88
Frank W. Bray *Texas Tech* '60
Charles L. Broadwell *Kansas* '56 †
Marvin D. Brown *Indiana* '75
John F. Buck *Indiana* '75 †
Robert L. Buffum *Stanford* '32 †
Bradley L. Campbell *Miami* '93
Philip J. Carpenter *Swarthmore* 1908 †
Gordon T. Carter *Alabama* '75
Edward G. Chase Jr. *Michigan* '41 †
John V. Ciccarelli *CSUN* '72
Bob W. Coleman *Oklahoma* '55 †
Lewis K. Cooksey *Carnegie Mellon* '29 †
John S. Copeland *Purdue* '68
C Correia *Penn* '96
Everett Coutant *Duke* '42 †
Leroy E. Cox *USC* '49 †
Joseph B. Crowley *CWRU* '50 †
Paul R. Dain *Allegheny* '44 †
Ralph D. Daniel *Arizona* '47 †
Philip H. Davidson III *Arizona* '59 †
Burns H. Davison III *Iowa State* '79
Drake DelosSantos *Butler* '22
Christopher L. DeMarchi *Valpo* '07
Valarie DeMarchi *Friend of Phi Psi*
James C. Denny *W&J* '68
Mary Lu Denny *Friend of Phi Psi*
Ann DeWar Blecken *Friend of Phi Psi* †
Haldon C. Dick *Bowling Green* '55
Robert L. Donley *USC* '35 †
John R. Donnell Jr. *CWRU* '59
James W. Emison III *DePauw* '49 †
James E. Flinn *Texas* '47 (*Northwestern* '49) †
Robert W. Frazier *Washington* '60 †
George S. Frost *Ohio State* '46 †
Ernest H. Garbe *Columbia* '40 †
Ray H. Garra Jr. *Duke* '52 (*UCLA* '54) †
Stephen W. Getgey *Ashland* '89
Hugh L. Gilmore *Wittenberg* '34 †
Mitchell H. Grant *Ohio State* '78
John S. Griffin *Purdue* '36 †
Alan B. Grosbach *Indiana* '65
Craig J. Grybowski *TCNJ* '90
Byron W. Gustin *Ohio State* '63
Walter A. Hagen *Illinois* '44
John R. Harman *Illinois* '40 †
Terrence G. Harper *Oklahoma State* '85 †

John Harrington *Duke* '56
Erin B. Hart *Friend of Phi Psi*
Richard W. Hart *Illinois* '29 †
Travis A. Hart *Indiana* '92
Earl F. Hawkins *CWRU* '52 †
Willard C. Hays *CWRU* '41 †
Christopher J. Hedberg *Colorado* '89
Frederick A. Hegele *Ohio State* '63
Frederick B. Hendricks *DePauw* '55
Thomas D. Henrion *Nebraska* '62
Carlos R. Hernandez *Stanford* '78
Enrico A. Hernandez *Stanford* '78
Charles S. Higgins Jr. *Vanderbilt* '67
Jesse T. Hile *Indiana State* '03
Randolph H. Hoge *Virginia* 1921 †
Matthew W. Holt *NIU* '16
Dallas F. Horvath *Bowling Green* '63 †
Phyllis Hovendick *Friend of Phi Psi* †
Robert L. Hoy Jr. *Missouri* '59 †
Harry V. Huffman *Purdue* '61 †
Hunter Brooks Watson Memorial Fund
Friend of Phi Psi
Bruce A. Jackson *CWRU* '70
Neil D. Johnson *Bowling Green* '91 †
Colin N. Jones *Texas* '46
Gaston C. Jones *Ole Miss* '37 †
Kyle F. Jordan *Valpo* '97
N. Eugene Kelley *Indiana* '53
John D. Klinedinst *W&L* '68
Gregory C. Knapp *Illinois* '72 (*Brown* '71)
Charles E. Koehn *Vanderbilt* '49 (*Illinois* '49) †
Charles E. Koehn *Illinois* '78
Richard S. Kohagen *Washington* '55
David J. Kubacki *CWRU* '92
Myron Lambert *Iowa State* '53
Ruddick C. Lawrence *Washington* '31 †
Robert E. Leber *Gettysburg* '46 †
Michael A. Ley *Edinboro* '86
Brandon W. Lortz *Capital* '10
Robert F. Marchesani Jr. *Butler* '94 (*IUP* '79)
Henry B. Marvin *USC* '56 †
Michael H. McCoy *Indiana* '58 †
Dale J. McKnight *Washington* '32 †
Stephen A. McLelland *Michigan State* '72
D. Bruce McMahan *USC* '57 †
Thomas D. Meisner Sr. *Lafayette* '68 †
Norman R. Mendenhall *Purdue* 1923 †
Patricia Mentzer *Friend of Phi Psi*
Scot B. Mentzer *Temple* '87
Bryan L. Miller *Indiana State* '92
James L. Miller *Ohio State* '85
Virgil R. Moen *Beloit* '27 †
Ronald S. Mundy *Iowa State* '79
Jerry Nelson *UCLA* '48 †
Steven E. Nieslawski *Illinois* '79
James L. Norcross *Gettysburg* '78
Timothy P. O'Brien *Texas* '00 (*Florida* '77)
Jerry A. O'Callaghan *Oregon* '40 †
Ari J. Officer *Stanford* '06
Steven J. Olson *Butler* '91
Richard E. Ong *Oregon State* '55 †
Stephen R. O'Rourke *Missouri* '74
Ryan M. Page *Iowa State* '11
Robert J. Parada Jr. *RIT* '92
John O. Parker *Colorado* '38 †
Jeffrey D. Patterson *Illinois* '78
Thomas C. Pennington *Texas* '80
Kenneth M. Perscheid *UC Berkeley* '78
Marc S. Persson *F&M* '97

John H. Pierce *Lafayette* '78
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 TURNING MY DREAMS INTO REALITY AND ONE
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We are profoundly grateful for your commitment and proud to honor your role in this journey. From the bottom of our hearts — thank you for helping us build a better future, one brother at a time.

Fraternally and gratefully,

Benjamin S. Nicol, CFRE *Valpo '00*
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These men come from different professions and backgrounds, yet have one common goal: to serve the brotherhood of Phi Kappa Psi. They are dedicated, hardworking brothers who desire the best for each of our undergraduate men. They are proud to be a part of the brotherhood and want to continue the tradition of excellence and work to provide even more scholarship and leadership support. Our Trustees believe that Phi Kappa Psi is built on the success of each individual member's potential: the potential to excel academically, to serve with great joy, to lead and to create lasting change in chapters, campuses, and communities across the country.

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The simplest way to support Phi Psi is to make a cash gift in the form of a multi-year pledge or one-time gift.

Multi-year pledge

Making a multi-year pledge allows you to spread out your gift over a maximum of 5 years and provide Phi Psi with monthly, quarterly, or annual contributions.

One-time gift

Give via the Foundation's online giving form by scanning the QR code or visiting pkpfoundation.org/make-an-impact. You can also mail a check to:



Phi Kappa Psi Foundation
5395 Emerson Way
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YOUR DONOR-ADVISED FUND

Donor-advised funds have become an increasingly popular way to realize personal philanthropic goals in recent years. If you have a donor-advised fund, you know grants are easy to make. We are a qualifying charitable organization, eligible to receive your grant, and your support will help Phi Psi when it needs it most. Since your grant comes from funds that have already been set aside for charitable giving, there is no change in the assets you have available to meet daily needs or realize future financial goals.

When you make a donor-advised fund grant to the Foundation, please let us know and be sure to designate your gift to the fund of your choosing.

PLANNED GIFT

There are gift planning options that are specifically designed to focus on future benefits. Many of these options are simple to implement as part of your long-term planning.

- A will or living trust is a roadmap for distributing your property and can be used to make a gift that supports Phi Psi in a meaningful, personal way.
- One of the simplest but most often overlooked opportunities for making a meaningful charitable gift is to name us as a beneficiary of an existing life insurance policy, retirement account, donor advised fund account, or bank account.

APPRECIATED STOCK

A gift of appreciated stock held more than one year is a tax-wise way to make a gift that helps Phi Psi today. When compared to making a gift of cash, a gift of appreciated stock provides a very important benefit: you pay no capital gains tax on the appreciated value of the stock. In addition, when you itemize your tax return, the gift qualifies for a deduction equal to the stock's current value, even though no tax has been paid on the appreciation.

EXAMPLE: Brother Williams purchased stock in a tech services company five years ago for \$10,000. The company has enjoyed extraordinary success and the stock is now worth \$40,000. Brother Williams decides it is an ideal time to support Phi Psi. He makes a gift to the Foundation of half the stock—a gift valued at \$20,000, with a basis of \$5,000. Because he itemizes his return, Brother Williams' gift qualifies for a deduction of \$20,000 and he pays no capital gains tax on the \$15,000 of appreciation.

IRA DISTRIBUTION

If you are an IRA owner age 70½ or over, making a gift through a qualified charitable distribution (QCD) is an option worth considering. You benefit because there are some distinct advantages that accompany this gift option.

- Although there is no tax deduction, the amount transferred is excluded from your income for federal tax purposes—you owe no tax on the transfer!
- The amount you give counts toward your required minimum distribution (RMD) when one is due. (Under the SECURE Act passed in 2019, RMDs must begin at age 72.)
- Transfers up to \$100,000 (annual aggregate limit) qualify for this favorable tax treatment each year (but contributions to an IRA after age 70½ reduce QCD amounts).

To learn more about how to make a pledge, stock gift, IRA distribution, or planned gift for Phi Psi, please contact Lee Fuller, Vice President of Development, at lgf@pkpfoundation.org or 317-275-3400.



PHI KAPPA PSI
FOUNDATION

Ready for Life

PHI PSI'S COMMUNITY FOUNDATION

Readying Phi Psi members, chapters,
and volunteers for a purposeful life since 1914.



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