PHI KAPPA PSI FOUNDATION

FISCAL YEAR 2025

IMPACT REPORT

TOGETHER, WE'RE ENSURING
THE NEXT GENERATION IS

Ready for Life



EST. 1914

PHI KAPPA PSI
FOUNDATION

The mission of the Phi Kappa Psi Foundation is to raise, invest, and grant resources to equip every brother to lead a purposeful life of character, service, and impact in his community.

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.





Honorable men leading lives of
CHARACTER, SERVICE, AND IMPACT.

Letter from the CHAIRMAN

Brothers,

As I look back over the past year, I can't help but reflect on the power of our shared investment in Phi Kappa Psi, and celebrate the successes we've achieved because of our alumni.

In the pages of this report, you'll read stories about what our scholarships have meant to recipients, and how they've led to inspiring acts of service. Our leadership development has helped grow Phi Psis rooted in principle and integrity. And our housing initiatives have created safe, healthy living spaces where lifelong friendships are born.

At the same time, I'm looking forward to where the Foundation is poised to go from here. Since our establishment in 1914 through our first scholarship awards and early leadership programs, we have continued to evolve through the years with intention. Now, we find ourselves at yet another defining moment that will shape the course of our future.

As we continually evaluate our work to ensure it reflects our purpose, we have recognized that the Foundation's expanding reach and growing impact on brothers, donors, chapters, and communities calls for a renewed articulation of who we are and where we are headed. Rooted in our heritage while embracing the opportunities before us, the Foundation has adopted new mission and vision statements that provide a clear direction for the future.

Of course, none of this would be possible without you. Advancing our vision takes commitment and participation. Making a donation, serving on a scholarship selection committee, mentoring a Phi Psi, attending a Foundation organizational webinar, connecting with your local alumni association — there are many ways to get involved. I encourage you to explore these and other opportunities to keep the flame of our Fraternity burning bright. Phi Kappa Psi is counting on us to lead the way. With sincere gratitude, I thank you for your continued support.

In brotherhood,

Timothy P. McCourt *Washington '78*
Chairman

2025 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.

SCHOLARSHIPS, FELLOWSHIPS & GRANTS

$518,519

LEADERSHIP PROGRAMMING NELSON LEADERSHIP INSTITUTE

$421,609

EDUCATIONAL HOUSING GRANTS

$806,577

PROGRAM FACILITATION & MANAGEMENT EXPENSES

$1,724,275

CHAPTER DEVELOPMENT SERVICES

$127,461

TOTAL 2025 IMPACT

$3,598,441

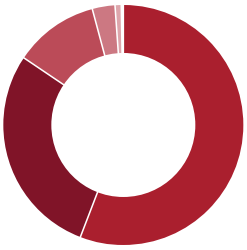
FINANCIAL HIGHLIGHTS

FISCAL YEAR 2025

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

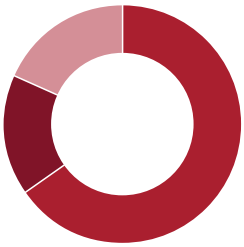
Despite navigating a year marked by elevated market volatility and economic uncertainty, the Foundation's disciplined, long-term investment strategy continued to deliver strong results. In 2025, the Foundation's diversified investment portfolio generated approximately $11.7 million in net investment return, helping total assets grow to more than $97 million. During the year, more than $6.5 million was invested in scholarships, leadership development, chapter support, fundraising, and administrative operations. While these financial results reflect the Foundation's strength and stewardship, their true significance is found in the lives they impact and the stories that follow.

TOTAL NET ASSETS
$97,290,787



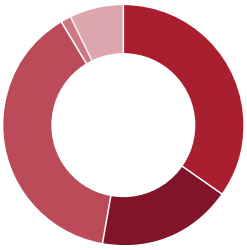
TOTAL REVENUES BY SOURCE
$20,954,402

General Investments*	$11,763,429
Member Support and Other Contributions	$6,070,088
PKP McMahan Finance Engine LLC Investments*	$2,353,021
Rental Income (Events, Etc.)	$699,160
Interest Income on Mortgage Notes Receivable	$122,187
Miscellaneous Loss	($53,483)



TOTAL EXPENSES BY SOURCE
$6,504,816

Program Expenses	$4,251,796
General & Administrative Expenses	$1,073,021
Fundraising Expenses	$1,179,999



TOTAL CONTRIBUTIONS
$6,070,088

Chapter Specific/Named Funds	$2,110,100
Phi Psi Fund	$1,106,302
Chapter Housing Funds	$2,336,020
PKP McMahan Finance Engine	$87,517
Laurel Hall Fund	$457
Nelson Leadership Institute	$429,692

**Net of Investment Fees*



FOUNDATION PORTFOLIO PERFORMANCE

As of December 31, 2025

	4th Quarter 2025	Trailing 12 Months	Trailing 3 Years	Trailing 5 Years
Long-Term Pool	**3.66%**	**19.41%**	**14.57%**	**10.64%**
Portfolio Benchmark	**3.13%**	**18.84%**	**14.45%**	**8.27%**
Market Benchmark	**3.03%**	**18.75%**	**16.06%**	**8.71%**
Immediate-Term Pool	**0.95%**	**4.15%**	**4.69%**	**3.06%**
Short-Term Pool	**0.89%**	**3.92%**	**4.39%**	**N/A**
Mission (Mortgage) Pool	**1.34%**	**5.38%**	**5.47%**	**5.29%**

INVESTMENT POOLS

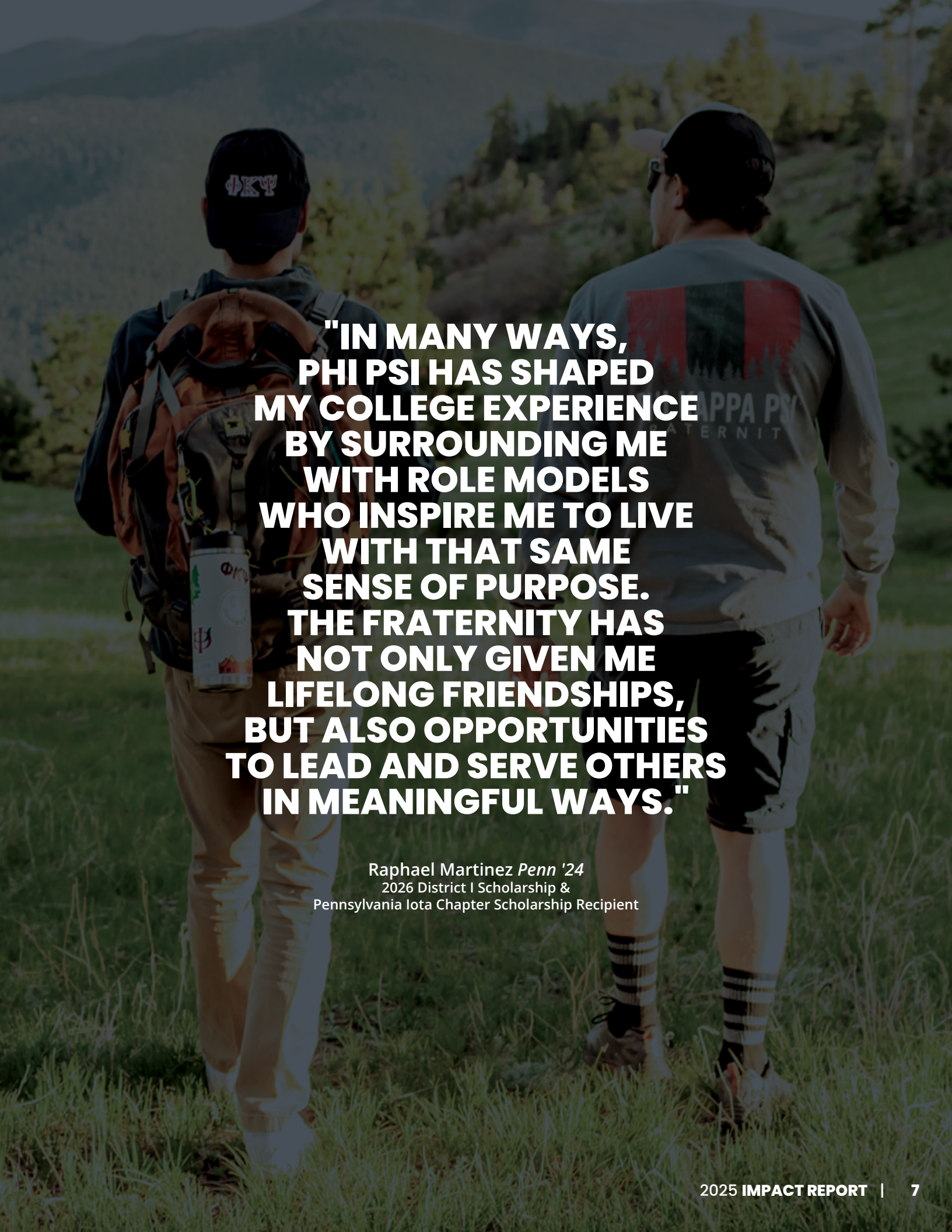
Oversight of our financial operations is led by the Board of Trustees and dedicated standing committees that ensure transparency, accountability, and strategic investment of your contributions for maximum impact.

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 stategy 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!



"IN MANY WAYS, PHI PSI HAS SHAPED MY COLLEGE EXPERIENCE BY SURROUNDING ME WITH ROLE MODELS WHO INSPIRE ME TO LIVE WITH THAT SAME SENSE OF PURPOSE. THE FRATERNITY HAS NOT ONLY GIVEN ME LIFELONG FRIENDSHIPS, BUT ALSO OPPORTUNITIES TO LEAD AND SERVE OTHERS IN MEANINGFUL WAYS."

Raphael Martinez *Penn '24*
2026 District I Scholarship &
Pennsylvania Iota Chapter Scholarship Recipient

STILL BEING WRITTEN

PUSHING THE BOUNDARIES OF COMPUTING

Frederick Dehmel *UC Berkeley '24* left his native London to pursue a career in quantum computing.

"I like difficult problems, and it is the newest frontier," he said. "The theory is still being written, which is rare and exciting."

A rising senior, Fred's goal is to attain a Ph.D. in theoretical computer science and mathematics, so he can dedicate his life to research and teaching. "I hope to be a professor in the field as it progresses, contributing to both the research and the next generation of people working on it."

Berkeley has provided Fred with the opportunity to chase this dream. "I have been able to explore advanced ideas in computation, cryptography, and mathematics while also building experience as both a researcher and teacher."

One of the difficult problems Fred has had to navigate while at Berkeley has been funding his education and the Phi Psi National Scholarship Program offered a solution. Fred received the 2025 Solon E. Summerfield Award in recognition of his academic standing, leadership, and service. "The financial assistance has mattered a great deal," he said. "I'm eternally thankful, and the scholarships motivated me to keep being my best."

Fred also received a $1,500 scholarship through California Gamma's Chapter OneFund. "The scholarship helped offset my tuition expenses," he shared. "That, in turn, allowed me to invest more fully in my education through travel to academic conferences, access to AI tools and subscriptions, and the computing resources needed to support my research and coursework."



“Your support is felt,” Fred said of the donors who contribute to the Foundation. “It pushes those of us who receive it to live up to what you've invested in.”

That investment is already yielding extraordinary returns. Fred has distinguished himself through exceptional academic achievement, taking graduate-level courses, serving as a head teaching assistant in the computer science department, and publishing research on quantum coding.

Beyond the classroom, he has embraced leadership and service, chairing four chapter committees, helping lead initiatives to prevent sexual harassment and violence on campus, and organizing fundraisers for the Surfrider Foundation, an organization dedicated to ocean and beach conservation.

Equally important, Fred is committed to lifting others along the way. He actively mentors his brothers and fellow students, embodying the values that donors make possible through their generosity.

“I strive to live out the Fraternity’s values by acting with honor in my work, in how I mentor others, and in the causes I choose to support,” he said.

For all that he gives, Fred also appreciates Phi Psi’s role in his success. He described his brothers as individuals who are driven “to craft the specific life they want to live. Not a lot of people following the crowd in Phi Psi.” They also hold him accountable. “It is much harder to drift when the people around you notice.”

“The brotherhood is for life,” Fred added. “That is the part of Phi Psi I expect to carry with me the longest.”

2025 NATIONAL & DISTRICT SCHOLARSHIPS

706
APPLICATIONS RECEIVED

$134,288
TOTAL DOLLARS AWARDED

45
TOTAL SCHOLARSHIPS AWARDED

2025 CHAPTER AWARDS

$348,343
TOTAL DOLLARS AWARDED

407
TOTAL CHAPTER AWARDS



"I VOLUNTEERED TO SERVE AGAIN THIS YEAR AS A NATIONAL SCHOLARSHIP REVIEWER. THIS MARKS MY FIFTEENTH YEAR PARTICIPATING IN THE SCHOLARSHIP REVIEW PROCESS, WHICH REMAINS ONE OF THE MOST REWARDING FORMS OF SERVICE IN THE FRATERNITY."

Ruben Campos *Texas Tech '95*
National Secretary & Loyal Scholarship Reviewer



NATIONAL & DISTRICT SCHOLARSHIPS

Phi Psi's National & District Scholarships honor brothers who exemplify our values through academic excellence, chapter leadership, and campus involvement. The 2025 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.

Ben King Award
Maxwell Muldoon *Virginia '23*

Founders Graduate Awards
Robert Kaufman *Brown '05*
Lucas Unver *Denison '19*

Jerry Nelson Award
Matthieu Fayet-Faber *UCLA '24*

Phillip M. Cornelius Award
Hunter Vincent *Capital '22*

Phi Kappa Psi Pride Award
Andrew Benecchi *Georgia '19*

Ralph "Dud" Daniel Leadership Awards
Drew Noonan *Texas '24*
Aiden Yaphe *Virginia '24*

Ruddick C. Lawrence Awards
Joshua Brown *Capital '24*
Nicholas Rohlwing *Illinois '22*

Schroeder Family Finance Award
Nicholas McCoy *Illinois '22*

Outstanding Solon E. Summerfield Award
Alexander Midura *UCLA '22*

Outstanding Solon E. Summerfield Runner-up
Frederick Dehmel *UC Berkeley '24*

Solon E. Summerfield Awards
Jacob Gerson *Clemson '24*
Bryan Wright *Purdue '23*
Luka Zaric *Indiana '23*

William H. Blanning Graduate Awards
Robert Hock *Michigan State '15*
Nathanael Smith *Alabama '22*

William R. Walker Award
Colin Maradik *LSU '24*

Winston Tate Awards
Matthew Daniel *Vanderbilt '24*
Greyson Gailey *Texas Tech '21*

District I Awards
Antonio Arena *Lafayette '22*
Anthony Doyle *Saint Joseph's '24*
Araan Joseph De Saram *F&M '24*
Luke Kest *Delaware '22*

District II Awards
Ragy Ebeid *John Hopkins '24*
Nicholas Martinez *John Hopkins '23*
Case Mongold *Capital '23*
Steven Solar *John Hopkins '19*

District III Awards
Owen Dougherty *Illinois '23*
Caiden Jeffries *Wabash '23*
Jackson Miller *Wittenberg '23*
Dakota Stacy *Wabash '23*

District IV Awards
Vincent Nucatola *Florida State '24*
Saaraim Nunez *W&L '24*
Brett Thibodeaux *UL Lafayette '22*
Zachary Woloff *Clemson '24*

District V Awards
Brayden Bresler *Missouri '23*
Max Simmons *Iowa '22*
Joseph Wagner *Missouri '22*
Luke Werthmann *Iowa State '21*

District VI Awards
Ryan Ezhari *UC Berkeley '23*
Jonathan Joseph *Washington '22*
Max Prezeau *UCLA '23*
Braden Weiss *UCLA '22*

Help Recognize
PHI PSI'S BEST + BRIGHTEST

In 2025 nearly 100 alumni volunteered as scholarship reviewers, helping identify undergraduate brothers who exemplify academic excellence, leadership, and service. Join this important effort.

Scan the QR code to volunteer today.

2025 NATIONAL FELLOWSHIPS

$6,288
TOTAL DOLLARS AWARDED

10
TOTAL FELLOWSHIPS AWARDED

2025 RECIPIENTS

Neil Johnson Fellowship
Evan Englander *SUNY Oneonta '09*

Terrence "Terry" G. Harper Fellowships
Jacob Gerson *Clemson '24*
Devin Bao Pham Pelphrey *Kentucky '25*

Shane Yates Fellowships
Michael Cruzado *Wabash '23*
Liam Dohl *Illinois State '23*
Caiden Jeffries *Wabash '23*
Deacon Mansfield *RIT '23*
Liam Mckernon *Akron '24*
Jack Webb IV *Tennessee '24*
Boyd Wechter *Akron '24*

THE TRAIL AHEAD

BROTHERHOOD IN FOCUS

"I applied for the *Trailhead* program because it felt like a once-in-a-lifetime opportunity,."

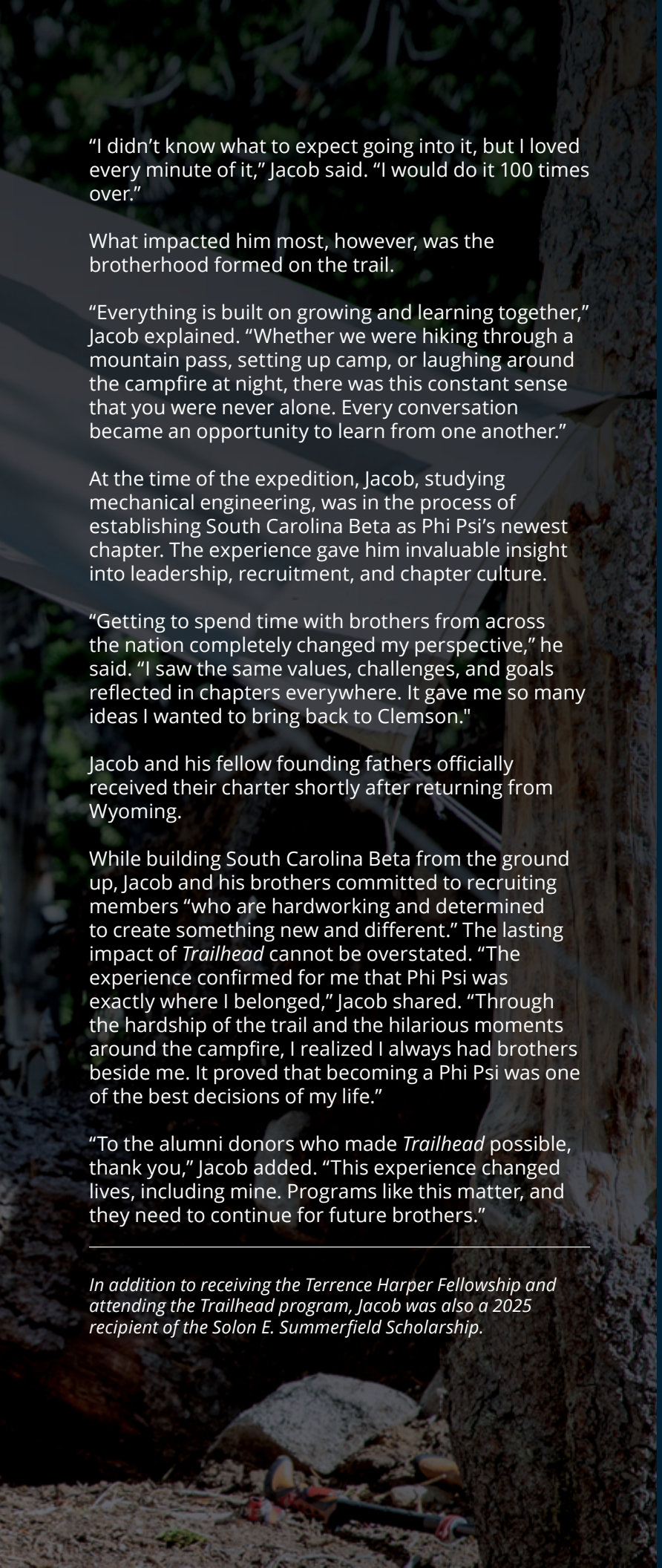
"The idea of backpacking through the mountains of Wyoming while building relationships with brothers from across the country was something I couldn't pass up," shared Jacob Gerson *Clemson '25*.

Trailhead, Phi Psi's wilderness leadership experience hosted by the Nelson Leadership Institute in partnership with the National Outdoor Leadership School (NOLS) was far more than a hiking trip. Last summer's weeklong course pushed brothers beyond comfort zones and into moments that demand courage, resilience, trust, and teamwork. Deep in the rugged wilderness of Wyoming's Wind River and Absaroka Mountains, participants spent seven days and six nights navigating breathtaking terrain at elevations reaching more than 10,000 feet. Days were filled with backpacking, route finding, leadership exercises, and problem solving. Nights end around campfires beneath endless stars, where conversations became authentic, walls come down, and lifelong bonds were formed.

For Jacob, who participated with the financial help of a Terrence Harper Fellowship, the experience proved transformational.

"This program was the single most impactful experience of my life," he reflected. "It wasn't just hiking. It was an outdoor classroom with three incredible guides who lead the group, testing leadership in real time. We learned to lead when you're exhausted, uncomfortable, uncertain, and responsible for others."

Designed for both experienced outdoorsmen and complete novices, *Trailhead* challenges participants physically, mentally, and emotionally. Brothers carry everything they need on their backs while traveling 30 to 60 miles through remote wilderness. Along the way, they learn not only outdoor survival and navigation skills, but also how to communicate under pressure, make decisions as a team, and place the needs of the group ahead of themselves.



"I didn't know what to expect going into it, but I loved every minute of it," Jacob said. "I would do it 100 times over."

What impacted him most, however, was the brotherhood formed on the trail.

"Everything is built on growing and learning together," Jacob explained. "Whether we were hiking through a mountain pass, setting up camp, or laughing around the campfire at night, there was this constant sense that you were never alone. Every conversation became an opportunity to learn from one another."

At the time of the expedition, Jacob, studying mechanical engineering, was in the process of establishing South Carolina Beta as Phi Psi's newest chapter. The experience gave him invaluable insight into leadership, recruitment, and chapter culture.

"Getting to spend time with brothers from across the nation completely changed my perspective," he said. "I saw the same values, challenges, and goals reflected in chapters everywhere. It gave me so many ideas I wanted to bring back to Clemson."

Jacob and his fellow founding fathers officially received their charter shortly after returning from Wyoming.

While building South Carolina Beta from the ground up, Jacob and his brothers committed to recruiting members "who are hardworking and determined to create something new and different." The lasting impact of *Trailhead* cannot be overstated. "The experience confirmed for me that Phi Psi was exactly where I belonged," Jacob shared. "Through the hardship of the trail and the hilarious moments around the campfire, I realized I always had brothers beside me. It proved that becoming a Phi Psi was one of the best decisions of my life."

"To the alumni donors who made *Trailhead* possible, thank you," Jacob added. "This experience changed lives, including mine. Programs like this matter, and they need to continue for future brothers."

In addition to receiving the Terrence Harper Fellowship and attending the Trailhead program, Jacob was also a 2025 recipient of the Solon E. Summerfield Scholarship.

2025 NLI IMPACT

$421,609
IN LEADERSHIP IMPACT

TRAILHEAD
NELSON LEADERSHIP INSTITUTE

BY THE NUMBERS

1
TRAILHEAD PROGRAMS

12
TRAILHEAD PARTICIPANTS

9
CHAPTERS REPRESENTED

EXPLORE
NELSON LEADERSHIP INSTITUTE

BY THE NUMBERS

3
EXPLORE PROGRAMS

52
EXPLORE PARTICIPANTS

24
CHAPTERS REPRESENTED

CHAPTER PERFORMANCE

FISCAL YEAR 2025

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 GPA / ALL MEN'S AVG	NET ASSETS	CHAPTER IMPACT GRANTS
ALABAMA ALPHA (ALABAMA)	1,039	203	3.45 / -	$159,361	$1,000
ALABAMA BETA (AUBURN) ˣ	213	-	-	$3,911	$89*
ALABAMA GAMMA (HUNTSVILLE)	145	32	3.00 / -	$24,656	-
ARIZONA ALPHA (ARIZONA) ˣ	630	-	-	$517	-
ARIZONA BETA (ASU)	870	122	3.05 / -	$89,341	-
CALIFORNIA BETA (STANFORD)	1,088	71	3.87 / -	$220,604	-
CALIFORNIA DELTA (USC) ▲	1,714	8	3.34 / -	$2,703,500	$51,822 *
CALIFORNIA EPSILON (UCLA)	1,546	113	3.57 / 3.53	$3,224,203	$364,661
CALIFORNIA ETA (CAL POLY)	1,072	57	3.28 / 2.97	$125,847	-
CALIFORNIA GAMMA (UC BERKELEY)	849	69	- / 3.43	$295,000	$62,000
CALIFORNIA IOTA (UC DAVIS) ˣ	301	-	-	$27,131	$817*
CALIFORNIA KAPPA (UC IRVINE)	861	14	2.85 / 3.29	$106,926	-
CALIFORNIA LAMBDA (SAN DIEGO STATE) ˣ	846	-	-	$331,538	
CALIFORNIA MU (OCCIDENTAL) ˣ	238	-	-	$8,314	$260*
CALIFORNIA NU (UC RIVERSIDE) ˣ	359	-	-	$40,619	$1,282*
CALIFORNIA THETA (CSUN)	460	24	2.58 / -	$48,751	-
CALIFORNIA XI (LONG BEACH) ˣ	142	-	-	$34,955	$779*
CALIFORNIA ZETA (UC SANTA BARBARA)	500	10	-	$30,772	$4,200
COLORADO ALPHA (COLORADO)	1,302	146	- / 3.11	$368,776	$4,296
DELAWARE ALPHA (DELAWARE)	366	30	3.21 / -	$34,771	-
DISTRICT OF COLUMBIA ALPHA (GW) ˣ	500	-	-	$6,773	$108*
FLORIDA ALPHA (FSU)	764	34	2.93 / 3.25	$39,128	-
GEORGIA ALPHA (GEORGIA) ˣ	524	-	-	$47,157	$13,114*
GEORGIA BETA (GEORGIA TECH)	182	16	3.60 / -	$63,566	-
ILLINOIS ALPHA (NORTHWESTERN) ▲	1,321	-	-	$37,018	$1,144
ILLINOIS DELTA (ILLINOIS)	2,052	134	3.62 / -	$286,956	$127,267

▲ **COLONY** ˣ *CLOSED CHAPTER*

Top 5 Chapters BY LIVING ALUMNI

Indiana Beta	2,211	Kansas Alpha	1,809
Texas Alpha	2,106	West Virginia Alpha	1,763
Illinois Delta	2,052		

CHAPTER	LIVING ALUMNI	UNDERGRADUATE MEMBERS	CHAPTER GPA / ALL MEN'S AVG	NET ASSETS	CHAPTER IMPACT GRANTS
ILLINOIS EPSILON (ILLINOIS STATE)	433	68	3.07 / -	$90,074	$2,150
ILLINOIS ETA (SIUE)	385	13	2.97 / 2.90	$48,653	-
ILLINOIS IOTA (NORTHERN ILLINOIS)	336	58	2.67 / -	$41,726	-
ILLINOIS THETA (UIC)	304	58	3.08 / -	$58,104	-
ILLINOIS ZETA (DEPAUL)	559	25	3.10 / -	$110,625	-
INDIANA ALPHA (DEPAUW)	1,389	54	3.35 / -	$505,636	$9,400
INDIANA BETA (INDIANA)	2,211	138	3.41 / -	$374,755	$7,750
INDIANA DELTA (PURDUE)	1,643	95	3.11 / -	$459,168	$68,505
INDIANA EPSILON (VALPO)	1,267	36	3.28 / 3.13	$285,590	$47,000
INDIANA ETA (INDIANA STATE)	370	17	2.89 / -	$53,353	-
INDIANA GAMMA (WABASH)	1,120	56	-	$118,204	$3,000
INDIANA IOTA (BALL STATE)	236	47	3.06 / 2.94	$33,678	-
INDIANA THETA (IU INDY) [x]	177	-	-	$36,775	$374*
INDIANA ZETA (BUTLER)	853	22	3.35 / -	$141,384	$750
IOWA ALPHA (IOWA)	1,497	203	3.37 / 3.16	$158,768	$5,750
IOWA BETA (IOWA STATE)	1,035	118	2.98 / -	$1,750,214	$7,500

Top 5 Chapters BY UNDERGADUATE MEMBERS

Mississippi Alpha	296	Texas Alpha	196
Alabama Alpha	203	Missouri Alpha	179
Iowa Alpha	203		

KANSAS ALPHA (KANSAS)	1,809	118	- / 3.26	$102,179	-
KENTUCKY BETA (KENTUCKY)	417	31	3.16 / -	$385,314	$5,000
LOUISIANA ALPHA (LSU)	1,071	73	-	$202,777	-
LOUISIANA BETA (UL LAFAYETTE)	349	54	2.86 / 2.87	$144,202	$3,500
LOUISIANA GAMMA (LOYOLA) [x]	408	-	-	$26,831	$822*
MARYLAND ALPHA (JOHNS HOPKINS)	1,082	45	3.72 / 3.60	$588,273	$19,250
MARYLAND DELTA (TOWSON)	59	19	3.00 / -	$40,983	-
MARYLAND GAMMA (MARYLAND) [x]	251	-	-	$8,032	$207*
MASSACHUSETTS BETA (BRANDEIS)	444	36	-	$93,039	$1,450
MASSACHUSETTES GAMMA (MIT)	-	35	-	-	-
MICHIGAN ALPHA (MICHIGAN) [x]	1,243	-	-	$204,422	-
MICHIGAN BETA (MICHIGAN STATE)	997	86	2.95 / -	$668,408	$12,900
MINNESOTA BETA (UMN TWIN CITIES)	1,098	84	3.44 / -	$902,785	$23,427
MINNESOTA DELTA (UMN DULUTH)	187	18	3.26 / -	$83,493	-
MINNESOTA GAMMA (MNSU MANKATO)	518	32	2.83 / 3.07	$41,521	-
MISSISSIPPI ALPHA (OLE MISS)	1,659	296	2.78 / -	$432,821	$1,968
MISSOURI ALPHA (MISSOURI)	1,307	179	3.17 / -	$267,179	$14,750
NEBRASKA ALPHA (NEBRASKA)	1,282	40	3.21 / 3.22	$468,111	$7,050

▲ COLONY [x] *CLOSED CHAPTER*

All District GPA
VERSUS ALL MEN'S AVG

District I	3.23 / 3.19	District IV	3.23 / 3.28
District II	3.18 / 3.21	District V	3.14 / 3.16
District III	3.15 / 3.04	District VI	3.20 / 3.28

CHAPTER	LIVING ALUMNI	UNDERGRADUATE MEMBERS	CHAPTER GPA / ALL MEN'S AVG	NET ASSETS	CHAPTER IMPACT GRANTS
NEBRASKA BETA (CREIGHTON) x	1,377	-	-	$54,277	-
NEW JERSEY BETA (MONMOUTH)	451	2	3.69 / -	$37,110	-
NEW JERSEY DELTA (TCNJ)	574	64	3.27 / 3.07	$53,332	$250
NEW JERSEY EPSILON (ROWAN)	379	26	2.75 / 3.05	$66,244	$250
NEW JERSEY GAMMA (RUTGERS) x	463	-	-	$34,573	-
NEW YORK ALPHA (CORNELL) x	1,379	-	-	$102,570	$3,391*
NEW YORK BETA (SYRACUSE) x	1,314	-	-	$212,507	$5,000*
NEW YORK ETA (BUFFALO) x	652	-	-	$151,415	-
NEW YORK IOTA (BINGHAMTON) x	385	-	-	$27,595	-
NEW YORK KAPPA (SUNY ONEONTA)	349	21	-	$169,467	-
NEW YORK THETA (RIT)	490	37	2.85 / 3.23	$186,625	$4,550
NORTH CAROLINA BETA (EAST CAROLINA) x	268	-	-	$17,998	$534*
OHIO ALPHA (OHIO WESLEYAN) x	1,022	-	-	$52,813	$1,705*
OHIO BETA (WITTENBERG)	1,156	39	3.42 / -	$483,392	-
OHIO DELTA (OHIO STATE)▲	1,650	16	3.06 / -	$2,762,039	$173,130
OHIO EPSILON (CWRU)	953	35	3.45 / 3.53	$361,752	$9,050

Top 5 Chapters
BY NET ASSETS

Tennessee Delta	$4,465,033	Ohio Delta	$2,762,039
California Epsilon	$3,224,203	California Delta	$2,703,500
Washington Alpha	$3,151,134		

OHIO ETA (TOLEDO)	1,048	35	2.96 / -	$44,202	-
OHIO IOTA (AKRON)	341	24	3.08 / 2.84	$39,577	-
OHIO KAPPA (KENT STATE) x	93	-	-	$196	-
OHIO LAMBDA (MIAMI)	1,324	27	3.24 / 3.18	$183,830	$3,433
OHIO MU (DAYTON)	379	44	3.24 / -	$117,424	-
OHIO NU (OHIO)	444	105	3.16 / -	$29,524	-
OHIO OMICRON (MUSKINGUM)	169	23	2.78 / -	$28,721	-
OHIO PI (DENISON)	101	34	3.29 / -	$24,291	-
OHIO THETA (ASHLAND)	813	22	3.17 / -	$120,473	$2,500
OHIO XI (CAPITAL)	241	29	3.39 / 3.01	$55,458	-
OHIO ZETA (BOWLING GREEN) x	680	-	-	$56,010	$1,705*
OKLAHOMA ALPHA (OKLAHOMA)	960	23	2.95 / -	$109,122	$14,944
OREGON ALPHA (OREGON)	1,229	43	3.16 / 3.20	$296,017	-
OREGON BETA (OREGON STATE)	917	140	3.13 / -	$281,433	$7,000
PENNSYLVANIA ALPHA (W&J)	865	24	3.00 / 3.10	$41,045	-
PENNSYLVANIA BETA (ALLEGHENY)	1,042	10	2.90 / -	$263,530	-
PENNSYLVANIA EPSILON (GETTYSBURG) x	916	-	-	$123,270	$1,026
PENNSYLVANIA ETA (F&M)	821	21	3.37 / 3.34	$68,468	$5,279

▲ COLONY *x CLOSED CHAPTER*

Top 5 Chapters BY IMPACT GRANTS

California Epsilon $364,661
Ohio Delta $173,130
Illinois Delta $127,267
Indiana Delta $68,505
California Gamma $62,000

CHAPTER	LIVING ALUMNI	UNDERGRADUATE MEMBERS	CHAPTER GPA / ALL MEN'S AVG	NET ASSETS	CHAPTER IMPACT GRANTS
PENNSYLVANIA GAMMA (BUCKNELL) ˣ	1,301	-	-	$85,973	$2,806*
PENNSYLVANIA IOTA (PENN)	841	52	3.78 / -	$176,929	$2,500
PENNSYLVANIA LAMBDA (PENN STATE)	1,126	86	3.35 / -	$282,887	$1,623
PENNSYLVANIA NU (IUP) ˣ	777	-	-	$47,181	-
PENNSYLVANIA PHI (LYCOMING)	165	2	-	$31,802	-
PENNSYLVANIA RHO (YORK) ˣ	358	-	-	$37,571	-
PENNSYLVANIA SIGMA (SAINT JOSEPH'S)	262	36	3.23 / -	$31,302	-
PENNSYLVANIA THETA (LAFAYETTE)	1,144	63	3.29 / -	$943,150	$14,168
PENNSYLVANIA UPSILON (DREXEL) ˣ	290	-	-	$35,056	-
PENNSYLVANIA XI (EDINBORO) ˣ	271	-	-	$3,421	$90*
PENNSYLVANIA ZETA (DICKINSON) ˣ	675	-	-	$11	-
RHODE ISLAND ALPHA (BROWN) ˣ	913	-	-	$43,411	$1,454*
RHODE ISLAND BETA (URI)	1,253	93	3.10 / -	$194,919	-
SOUTH CAROLINA ALPHA (SOUTH CAROLINA) ˣ	152	-	-	$24,728	-
SOUTH CAROLINA BETA (CLEMSON)	1	78	3.38 / -	$34,696	$857
TENNESSEE DELTA (VANDERBILT)	1,227	77	3.83 / 3.64	$4,465,033	$53,100
TENNESSEE EPSILON (TENNESSEE)	514	130	3.40 / 3.36	$109,074	-
TEXAS ALPHA (TEXAS)	2,106	196	3.63 / -	$932,094	$32,750
TEXAS BETA (TEXAS TECH)	1,300	91	2.95 / -	$183,204	$4,700
TEXAS EPSILON (SFA)	163	24	2.62 / -	$43,187	$960
TEXAS ETA (TEXAS A&M)	80	24	3.29 / -	$24,177	-
TEXAS GAMMA (TEXAS STATE) ˣ	591	-	-	$45,835	$128*
TEXAS ZETA (HOUSTON CHRISTIAN)	171	12	-	$35,566	-
VIRGINIA ALPHA (VIRGINIA)	963	56	-	$411,018	-
VIRGINIA BETA (W&L)	1,017	42	-	$410,806	$11,500
VIRGINIA ETA (VCU) ˣ	185	-	-	$29,364	-
VIRGINIA THETA (JMU)	195	110	3.03 / -	$24,889	-
VIRGINIA ZETA (VIRGINIA TECH)	607	117	3.34 / 3.28	$41,889	-
WASHINGTON ALPHA (WASHINGTON)	1,353	44	-	$3,151,134	$14,300
WEST VIRGINIA ALPHA (WVU)	1,763	101	-	$1,006,626	$750
WISCONSIN GAMMA (BELOIT)	898	19	-	$241,049	-
Totals			**3.19 / 3.20**	**$37,137,337**	**$1,249,815**

▲ **COLONY** *ˣ CLOSED CHAPTER*

**If a chapter remains closed and has not begun recolonization within one year following the end of its suspension period, the fund's annual distributable amount will be used to support district scholarships and/or leadership grants. The fund's principal remains invested and the annual distributable amount returns to the chapter's exclusive use once recolonization begins.*

GPA data is reported directly by colleges/universities and may not be available for all schools. Academic programs have varying degrees of difficulty; GPA comparisons are most meaningful within the same institution rather than across chapters.

PAYING IT FORWARD

A MENTOR, A MENTEE, AND A CONNECTION

A single conversation can change the trajectory of a young man's future. Sometimes, all it takes is one brother picking up the phone, sharing his experience, and opening a door that once seemed firmly closed.

For senior Raymond Chinn *Washington '23*, that connection became a defining part of his final year at the University of Washington. Preparing to graduate this June with a degree in electrical and computer engineering, Raymond knew he wanted to launch his career with purpose and he discovered that the Phi Psi brotherhood could help him do exactly that.

Last fall, Raymond joined the *Paul R. Wineman Mentoring Advantage Program (MAP)*, Phi Psi's national initiative that pairs undergraduate members with alumni mentors. What began as a simple introduction quickly evolved into a meaningful relationship that offered guidance, encouragement, and professional insight during a pivotal moment in his life.

"I first heard about it during a chapter meeting," he said. "At least fifteen brothers in our chapter are involved."

Through *MAP*, Raymond was matched with Dr. Mark Coker *Washington '82*, a fellow Washington Alpha brother whose career spans four decades in industrial and systems engineering, including leadership roles with Boeing, JP Morgan Chase, and the Department of Defense. Today, Mark serves as a lecturer at the University of Washington and faculty advisor to Washington Alpha.

"I'm at a point in my life where I'm paying things forward, so this was an easy decision," Mark said of becoming a mentor.

Beginning in January, the two met regularly for conversations that often stretched far beyond resumes and career advice. Their shared Phi Psi experience immediately created trust and familiarity. "He's been a great mentor to me," Raymond said. "I've learned a lot from him about work-life balance."

Mark appreciated the depth of Raymond's curiosity and ambition.

"I thought we connected well. Brotherhood plays an important part in that, since we probably share many of the same experiences," Mark explained. "As a fellow engineering graduate from UW, I can appreciate the challenge of balancing fraternity and academic life. Raymond's questions during were often about the future of the profession, especially with the rise of artificial intelligence."

"I appreciated the thoughtful questions he posed," Mark added. "It was much more than asking, 'How do I get a job?'"

The impact of the relationship extended well beyond their one-on-one conversations. Through Mark, Raymond was introduced to a broader network of professionals and mentors across industries.

"He's expanded my personal network and exposed me to a lot of different perspectives," Raymond shared.

Perhaps most importantly, the experience deepened Raymond's understanding of what Phi Psi brotherhood truly means. "Seeing how Mark showed genuine care and interest really reinforced how much alumni care about the Fraternity," he said. "Phi Psi is more than just the four years you're in college. It's about maintaining that connection. It's always there for you. It's always going to be there."

For Mark, the experience proved equally meaningful.

"Seeing Raymond win the chapter's Douglas R. Hora Scholarship was a great moment for me," he reflected. "One, I'm on the board that reviews the applicants, and two, Doug was in the pledge class before me, so I knew him well."

Raymond's advice for brothers interested in *MAP* is simple. "First, identify what you want. Don't be shy. It's up to you to maximize your experience."

Mark offered equally compelling advice to alumni considering mentorship: "Do it! But realize that you own the relationship. That means you have to make the first call, set the agenda, etc.," he said. "Being a mentor is an opportunity to pay it forward and help grow the next generation of Phi Psi."

Through programs like *MAP*, alumni are helping transform brotherhood into something far greater than a collegiate experience. They are creating lifelong connections that equip young men with guidance, confidence, professional networks, and the reassurance that Phi Psi will always remain part of their journey.



MAP
NELSON LEADERSHIP INSTITUTE

BY THE NUMBERS

177
MAP MENTEES

218
MAP MENTORS

129
MAP PAIRINGS

57
CHAPTERS REPRESENTED

$99
COST PER PARTICIPANT

BECOME A MENTOR. **CHANGE A LIFE.**

Share your experience, expand your network, and help a Phi Psi undergraduate navigate the transition from college to career through *MAP*.

Scan the QR code to become a *MAP* mentor today.

MORE THAN BRICKS + MORTAR

EVERY GENERATION INHERITS THE RESPONSIBILITY TO CARE FOR THE HOUSE

California Epsilon's Living Legacy

"Every generation of Phi Psis benefits from the chapter house. Every generation also inherits the responsibility to care for it." For Robert Wallan *UCLA '81*, that responsibility is deeply personal. As a member of the Cal Epsilon House Corporation Board, he helps oversee fundraising, insurance, and relations with UCLA. He has witnessed firsthand the realities of maintaining a facility valued at more than $12 million and home to hundreds of young men over its lifetime. "Although the chapter house was rebuilt less than 20 years ago, it has expensive building code-required features, including elevators and climate control, that require significant resources," he explained.

While chapter houses have always served as places where friendships are forged and future brothers are recruited, their role today extends far beyond providing a roof overhead. They are living-learning environments where students study, collaborate, develop leadership skills, and build habits that shape their futures. To fulfill that mission, chapter houses must provide modern technology, reliable infrastructure, safe living conditions, and spaces that support both academic achievement and personal well-being.

Preserving these environments requires a sustained investment, which is why the Phi Psi Foundation's educational housing grant program is so critical.

Through Chapter Housing and Operating Funds, held by the Foundation and designated for specific chapters, alumni have a meaningful way to protect and strengthen the places that have shaped generations of Phi Psis. Tax-deductible gifts to these funds help ensure chapter facilities remain safe, healthy, and educationally focused, while Foundation grant support assists with the maintenance, improvements, and upkeep necessary to keep these spaces thriving.

By supporting a Chapter Housing or Operating Fund, alumni are doing more than maintaining a building. They are investing in the experiences, opportunities, and lifelong impact that occur within its walls, ensuring future brothers have the same foundation for success that once benefited them.

"We maintain a large balance of funds with the Foundation, largely the result of major fundraising efforts surrounding the rebuild of the house, plus endowments created by individual alums," Robert shared.

That long-term planning has positioned the house corporation well, but the responsibility of caring for a premier facility never ends.

"The chapter has been very successful since its reinstatement in 2015, and the alumni support has provided financial stability for the chapter to continue to thrive," added Lloyd Talbert *UCLA '78*, chairman and treasurer of the Cal Epsilon House Corporation. "However, we have a large mortgage with 20 years remaining and, as the chapter house ages, we will start to incur significant maintenance costs to replace items like HVAC and kitchen equipment."

Like any major facility, a chapter house requires continual reinvestment. Systems wear out. Equipment must be replaced. The building needs updates to remain safe, functional, and relevant for future generations of students. While undergraduate members play an important role through responsible stewardship, alumni support remains essential to preserving the house corporation's long-term strength.

"The chapter is doing its part in maintaining membership levels and financial stewardship over dues and expenses," Lloyd explained. "Alumni can continue to do their part in financially supporting the chapter and house corporation by ensuring the funds required for house operations and upkeep are available as required."


ΦΚΨ
PHI KAPPA PSI
613



Grants from the Foundation come in two forms. Construction grants pay for building or renovating the designated education areas of a chapter house or for acquiring furniture or equipment for the area. Operating grants pay for the direct and indirect costs of maintaining a designated education area, meaning that money can be used to pay a certain percentage of the real estate taxes, insurance, utilities, and other facility expenses.

Together, these grants help preserve more than bricks and mortar. They sustain the environments where academic success is encouraged, leadership is developed, friendships are forged, and the values of Phi Kappa Psi are lived every day.

Minnesota Beta's Winning Formula

For Minnesota Beta, educational housing grants have become a tangible example of alumni investing in the future of the chapter and the young men who call it home.

The house corporation received its first Foundation housing grant in 2024 and a second grant the following year, bringing total support to approximately $11,500.

“These grants are made possible through the generosity of alumni donors who believe in the long-term success of Minnesota Beta,” said Chapter Advisor Andrew Zobel *UMN Twin Cities ’14*. “Those donors include both historical supporters who have supported the chapter through significant gifts and members of the 1609 Club, our recurring giving society that provides ongoing support year after year.”

Behind every grant is a community of brothers who recognize that a thriving chapter house requires more than annual dues and undergraduate effort. It requires alumni who are willing to invest in the educational environment that helps shape future leaders.

That philosophy inspired Mason Thimjon *UMN Twin Cities ’18*, to establish the 1609 Club in 2021. What began as a way for alumni to make consistent, accessible contributions has become an important source of ongoing support for the chapter's future.

“These grants exist specifically to support the educational portion of our chapter house,” Mason explained. “It's one of the best win-wins out there. When you free up resources on the educational side, it gives the chapter room to operate and invest in other areas that keep the house and chapter running well. Our alumni donors are supporting something meaningful, and the chapter gets the breathing room to put its resources where they're needed most.”

The impact extends well beyond the dollars received. Every grant helps strengthen the spaces where members study, collaborate, prepare for careers, and develop the skills that will serve them long after graduation. At the same time, it eases financial pressure on the chapter, allowing undergraduate leaders to focus on creating a stronger brotherhood and a healthier chapter experience.

For Minnesota Beta, the program demonstrates what is possible when alumni and undergraduates work together toward a common goal: ensuring the chapter house remains not just a place to live, but a place to learn, grow, and prepare for a purposeful life.

2025 HOUSING IMPACT

$806,577
TOTAL EDUCATIONAL HOUSING GRANTS

$470,982
HOUSE OPERATING GRANTS

CHAPTERS RECIEVING GRANTS
California Epsilon
California Gamma
Indiana Epsilon
Oklahoma Alpha
Minnesota Beta

$335,595
HOUSE CONSTRUCTION GRANTS

CHAPTERS RECIEVING GRANTS
Georgia Alpha
Illinois Delta
Indiana Delta
Indiana Epsilon
Ohio Delta





LEGACY *by* DESIGN

INVESTING IN PHI PSI'S FUTURE

For Don Bonine Jr. *Michigan State '60*, Phi Kappa Psi is not simply a part of his college experience.

It became a lifelong source of brotherhood, purpose, and connection that carried him through military service, leadership, and ultimately a desire to leave something meaningful behind for future generations.

Today, Don and his wife Linda are ensuring that impact will continue long after their lifetimes through a planned gift that reflects their generosity, and their belief in Phi Psi's ability to shape young men for decades to come.

"At some point in life, you begin thinking less about what you can accumulate and more about what you can leave behind," Don reflected. "Phi Psi invested in me during important moments of my life. Linda and I wanted to make sure we could invest in the future of Phi Psi in a truly lasting way."

For decades, Don has been a dedicated alumnus and volunteer, serving on national committees, attending more than twenty Grand Arch Councils, and giving countless hours in service to the brotherhood. Through it all, Linda has been alongside him, embracing the relationships and community that Phi Psi created throughout their lives together.

"Phi Psi has introduced us to lifelong friendships and experiences we never would have had otherwise," Linda shared. "Supporting it together just felt natural."

In 2024, Don approached Drew Thawley, the Foundation's Chief Advancement Officer, with a humble request: would the Foundation be interested in receiving ownership of a small life insurance policy he and Linda no longer needed? Don hoped to see the proceeds benefit U.S. military veterans and students in the ROTC program. Drew thought the idea was excellent but suspected something even greater might be possible.

After consulting with the Foundation's advisors on tax and life insurance planning, Drew determined that Don could be a strong candidate for the PKP McMahan Finance Engine LLC.

The Finance Engine was created to help alumni maximize their charitable impact through life insurance philanthropy. A Foundation-owned LLC, it owns and manages a portfolio of life insurance policies and invested assets designed specifically to benefit the brotherhood and strengthen Phi Psi's future. What makes it unique is its ability to help alumni either donate an existing policy or simply gift their personal insurability, allowing a new policy to be established that creates a transformational future gift.

"Many alumni discover they have significantly more insurability available than the amount of life insurance currently protecting their family or estate," Drew explained. "The Finance Engine helps donors leverage that additional insurability to create substantial future support for Phi Psi, often with little or no impact on their current assets."

For Don, the opportunity was remarkable. Working alongside the Foundation, he was able to leverage his existing policy into a new one that will provide a $1,000,000 benefit to Phi Psi. Don gifted his original policy to the Foundation, receiving charitable gift credit that provided meaningful tax benefits to the Bonine family.

Upon entering Chapter Eternal, Don's policy will provide a $1,000,000 benefit, with proceeds designated to establish the Bonine Veterans and ROTC Scholarship Fund, strengthen the ongoing work of the Finance Engine, and support the Foundation's broader mission through its programs and operations.

"When I first learned what was possible, I was honestly amazed," Don said. "I realized I could make a far greater impact than I ever imagined without affecting the financial security Linda and I had worked so hard to build."

Don's desire to support military-affiliated brothers is rooted in his own story. As a young undergraduate at Michigan State, he left school before graduating when finances became difficult. He worked in a factory until he was drafted into the U.S. Army, serving from 1964 to 1968. After completing Officer Candidate School, he deployed to Vietnam as an artillery officer, earning a Bronze Star and a promotion to captain. When he returned to Michigan State on the GI Bill, the financial realities of finishing his degree were still challenging, but the brotherhood of Phi Psi was waiting for him.

"I was welcomed back immediately," Don remembered. "The physical house had changed. Campus had changed. But the brotherhood was still there for me."

That experience never left him. "I understand firsthand the challenges many young veterans and ROTC students face," Don explained. "If our gift can help remove some of those burdens and allow young men to focus on becoming leaders, then we've accomplished something meaningful."

Don and Linda's story also challenges a common misconception about planned giving. "People often assume planned gifts are only for the wealthy," Don said. "That's simply not true. Linda and I built our little policy over many years, and the Finance Engine showed us there are creative ways to make a transformational impact that many people never realize is possible."

For Drew, the Bonine's gift represents the heart of Phi Psi philanthropy. "This gift is not simply about insurance or financial planning. It is about gratitude, legacy, and belief in the future relevance of Phi Psi."

"What matters most to us is knowing this gift will continue helping young men long after we're gone," Linda said. "There's something incredibly meaningful about knowing future generations will benefit from something we helped build together."



A POWERFUL AND UNIQUE PHILANTHROPIC TOOL

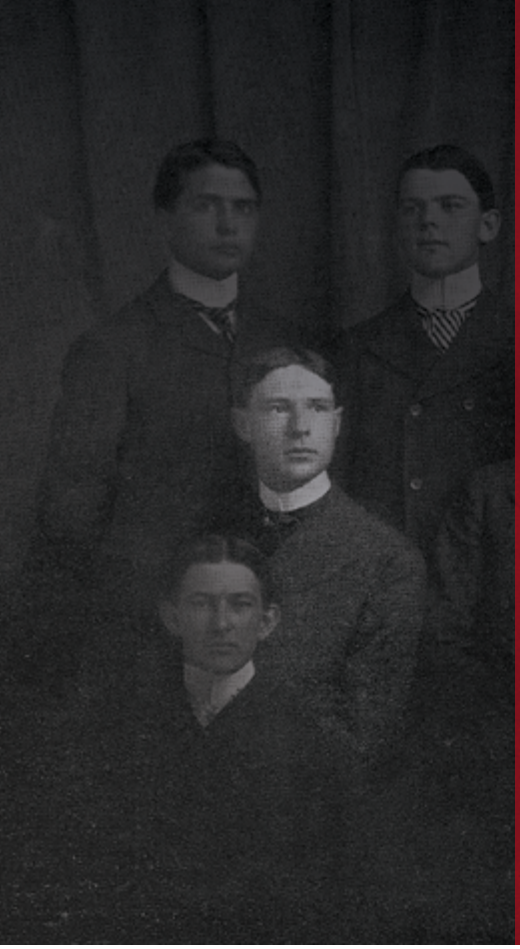
In 2004, Brother and then, Trustee Bruce McMahan *USC '57* gifted $3.5 million to the Foundation to expressly establish the PKP McMahan Finance Engine. The Finance Engine is a Foundation owned LLC that exists to finance and own gifts of life insurance designated to benefit the brotherhood. The Finance Engine owns and manages a portfolio of life insurance policies as well as a portfolio of invested assets. The annual earnings from these invested assets, along with tax-deductible gifts made by donors, underwrite the annual premiums on the life insurance policies. The Finance Engine was created to harness the power of our individual members, specifically the additional insurability of alumni who have an affinity, connection, and commitment to supporting the Foundation.

Maximize Your Charitable Giving WITH LIFE INSURANCE

Life insurance policy proceeds are among the largest gifts the Foundation will receive, often 20 to 100 times the size of annual gifts. And, it's simple and easy. Planned giving contributions are vital to Phi Psi's longevity and ability to carry out its mission, and they help weather annual fluctuations in charitable donations. If you're passionate about making a difference and want to increase your effects exponentially, life insurance can be an excellent way to make that happen.

If you're interested in making a heroic gift, please scan the QR code or contact Drew Thawley, Chief Advancement Officer at **dmt@pkpfoundation.org** to discuss how you may contribute your insurability and leave a lasting legacy to the brotherhood.





A LASTING *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.

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 those 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*
Myra Anthony *Friend of Phi Psi*
David L. Anthony *Iowa State '54* †
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* †
Ann DeWar Blecken *Friend of Phi Psi* †
Robert O. Blecken *Washington '47* †
Donald R. Bonine Jr. *Michigan State '60*
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* †
Shawn M. Collinsworth *Indiana State '91*
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*
Haldon C. Dick *Bowling Green '55*
John R. Donnell Jr. *CWRU '59*
Robert L. Donley *USC '35* †
Anonymous Donor *Friend of Phi Psi*
James W. Emison III *DePauw '49* †
Robert F. Fives *Rider '90*
James E. Flinn *Texas '47 (Northwestern '49)* †
James P. Fowler *CWRU '82*
Robert W. Frazier *Washington '60* †
George S. Frost *Ohio State '46* †
Ethan A. Gambill *Huntsville '17*
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* †
Scott R. Hart *UMN Duluth '10*
Travis A. Hart *Indiana '92*
Willard C. Hays *CWRU '41* †
Earl F. Hawkins *CWRU '52* †
Christopher J. Hedberg *Colorado '89*
Frederick A. Hegele *Ohio State '63*
Frederick B. Hendricks *DePauw '55*
David J. Hennicke *Beloit '56* †
Thomas D. Henrion *Nebraska '62*
Carlos R. Hernandez *Stanford '78*
Enrico A. Hernandez *Stanford '78*
Jesse T. Hile *Indiana State '03*
Charles S. Higgins Jr. *Vanderbilt '67*
Randolph H. Hoge *Virginia 1921* †
Matthew W. Holt *NIU '16*
Dallas F. Horvath *Bowling Green '63* †
Phyllis Hovendick *Friend of Phi Psi* †
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Douglas H. Rivlin *WVU '86*
Lissen Schnack *Friend of Phi Psi*
Solon E. Summerfield Foundation, Inc. *Friend of Phi Psi*
W. Guy Spriggs *Ohio State '71*
Jeffrey V. Tennant *WVU '74*
John L. Thomas *WVU '70*
Michael A. Torres *UC Berkeley '80*
UBS Financial Services Inc. *Friend of Phi Psi*
George E. Washington *UC Berkeley '63*
Wayne W. Wilson *Michigan State '59*
Robert A. Wolter *Iowa State '71*
Edmund C. Woodbury *Illinois '73*
Blake W. Yeaman *UC Berkeley '78*

CUM LAUDE

ANNUAL GIVING TOTALING $2,500 TO $4,999

Lee B. Backsen *Iowa State '58*
John W. Barksdale *Oklahoma '67*
Benjamin J. Bowman *UMN Twin Cities '99*
Willis M. Bywater *Iowa State '58*
Keith I. Chrestionson *UC Berkeley '78*
James C. Denny *W&J '68*
Mary Lu Denny *Friend of Phi Psi*
William M. Derrick *UMN Twin Cities '76*
Robert S. Dochterman *Illinois '85*
John N. Giamalis *WVU '76*
H. Fort Flowers Foundation, Inc. *Friend of Phi Psi*
David B. Henry *Bucknell '69*
Charles S. Higgins Jr. *Vanderbilt '67*
Lynne Knox *Friend of Phi Psi*
Benton H. Lamson *USC '86*
Nicholas P. Marassi *Washington '72*
Merrill Lynch *Friend of Phi Psi*
Ty R. Miller *UCLA '90*
Joshua J. Mitchell *Kentucky '95*
Anne Moyer *Friend of Phi Psi*
David S. Moyer *Alabama '91*
National Christian Foundation *Friend of Phi Psi*
National Philanthropic Trust *Friend of Phi Psi*
James A. Okonski *Illinois '71*
Lee A. Pyles *WVU '77*
Ross H. Stafford *Iowa State '70*
James C. Tipton *Oklahoma '58*
Keith G. Troutman *IUP '70*
James S. Watson *Iowa State '70*
David W. Womer *Butler '71*

FOUNDERS LEAGUE

ANNUAL GIVING TOTALING $1,000 TO $2,499

James S. Acheson *Illinois '52* †
Brian K. Acton *Purdue '82*
David A. Adams *Valpo '95*
Advisors Charitable Gift Fund *Friend of Phi Psi*
Kent E. Agness *Indiana '69*
Zachary W. Alderson *Indiana '24*
Andrew D. Allard *Iowa State '10*
Peter M. Anderson *Iowa State '07*
Ryan Anderson *Friend of Phi Psi*
Anonymous Donor *Friend of Phi Psi*
Jay A. Babchuk *CSUN '75*
Eric W. Balin-Watkins *Stanford '98*
Linda Ballou *Friend of Phi Psi*
William L. Ballou *Iowa State '60*
Rob Blackwell *Friend of Phi Psi*
John E. Bolton *CWRU '66*
James D. Boyle *Washington '88*
Bruce L. Braley *Iowa State '76*
Charles E. Brandman *CWRU '70*
Philip M. Browne *W&L '79*
Charitable Adult Rides & Services, Inc. *Friend of Phi Psi*
Alphonsus S. Cheng *UC Berkeley '96*
David F. Choate III *Lafayette '67*
Christopher J. Ciupke *Valpo '01*
Cline Holdings *Friend of Phi Psi*
Coline Jourdana-COCO JOURDANA LLC *Friend of Phi Psi*
Community Foundation of Middle Tennessee *Friend of Phi Psi*
David A. Creighton *Butler '87*

Wesley B. Crouse *Lafayette '78*
Roger L. Cutright *WVU '74*
Cygnet Strategies LLC *Friend of Phi Psi*
Burns H. Davison III *Iowa State '79*
Timothy W. Dearmond *Kentucky '88*
Andrew D. Deutsch *UMN Duluth '02*
Matthew DiDomenico *Friend of Phi Psi*
Dimmer Family Foundation *Friend of Phi Psi*
John B. Dimmer *Oregon '81*
James S. Dobbs *WVU '69*
Christopher J. Driscoll *Syracuse '07*
Miguel M. Flechas IV *Ole Miss '99*
Regina Flechas *Friend of Phi Psi*
Ryan D. Garlitz *Bowling Green '88*
Thomas C. Gentner Jr. *W&L '80*
Fadi J. Ghishan *UC Irvine '99*
Nathan C. Gomez *UC Berkeley '11*
James P. Grabenbauer *Iowa State '73*
Eric W. Gregory *Kentucky '88*
Groundswell *Friend of Phi Psi*
Charles J. Hageboeck *WVU '17*
James E. Hagler *Tennessee '98 (Vanderbilt '58)*
Mark L. Hall *Iowa State '73*
Sean D. Hammerle *LSU '90*
David H. Hannah *DePauw '69*
Benjamin A. Hardesty *WVU '69*
Charles G. Henderson *Alabama '86*
James William Hill Jr. *Iowa State '79*
Susan Hill *Friend of Phi Psi*
Thomas C. Hill Jr. *Bucknell '59*
Taiping Huang *Friend of Phi Psi*
Gary T. Jenkins *LSU '70*
Jason K. Johnson *Kentucky '94*
Johann Jonas *Friend of Phi Psi*
Augustus R. Jones *Ole Miss '70*
Joseph J. Keip *Monmouth '72*
Brian R. Kelm *Iowa State '73*
Benjamin C. Kessler *Wabash '71*
Jeffery L. Kessler *Indiana '75*
Marie L. Kinnard *Friend of Phi Psi*
John E. Klentos Jr. *Oklahoma '83*
Timothy J. Kramer *Iowa State '79*
John J. Kurgan *Illinois '76*
Brian D. LeFevre *Valpo '88*
Jeffrey B. Letoski *Lafayette '05*
Kevin D. Litchfield *Tennessee '02*
Zachary T. Longwell *Ashland '09*
Jay R. Loschky *Valpo '02*
Alan S. Lufkin *CWRU '00*
Brian K. Madacsi *LSU '97*
Charles S. Mahan *WVU '57*
Robert N. Maiolo *WVU '81*
Karl L. Marschel *Missouri '97*
Thomas J. Marsden *Iowa State '70*
Robert T. Martin *Rowan '05*
Sidney A. McVey *Oklahoma '65*
Thomas D. Meisner II *TCNJ '90*
Timothy M. Miller *WVU '74*
Clark W. Morey *Cal Poly '92*
Susan Newburger *Friend of Phi Psi*
Brand A. Newland *Iowa '00*
Tann A. Nichols *CWRU '93*
Russell R. Nicholson *UC Berkeley '51*
Omaha Community Foundation *Friend of Phi Psi*
David H. Orr *Michigan State '59*
Brandon K. Otto *Iowa State '09*
Ryan M. Page *Iowa State '11*
James R. Paponetti *Ashland '95*
Robert H. Patterson *Kentucky '94*
Cameron L. Peden *Muskingum '11*
Kenneth M. Perscheid *UC Berkeley '78*
Jason R. Pierce *Ashland '95*
Edward R. Pinson *Georgia '86*
John C. Pittman *Oklahoma '99*
Richard B. Pyles *WVU '70*
M. Robert Queler *F&M '59*
Bryan L. Ramona *UC Berkeley '78*
David A. Renner *Syracuse '59*
Tod W. Ridgeway *USC '66*
Ricardo G. Rivers *F&M '90*
Michael W. Robinson *WVU '81*
Anthony C. Sarver *Kentucky '95*
Wayne P. Sayatovic *Syracuse '64*
Eva Schoonmaker *Friend of Phi Psi*
Jeffrey J. Schrager *UC Berkeley '80*
Ryan M. Sewell *Nebraska '95*
David J. Shafer *Georgia '83*
Marc T. Shafer *Vanderbilt '76*
Kenneth A. Shwartz *URI '74 (Oregon State '75)*
Joel D. Silver *GW '03*
Eugene R. Singer *Brandeis '91*
Gretel Smith *Friend of Phi Psi*
Louis V. Smith Jr. *Kentucky '88*
Matthew G. Solak *Valpo '05*
Jerry A. Soper *Iowa State '73*
Adam H. Spielman *Indiana '89*
Richard M. Stanaro *UC Berkeley '80*
William L. Steinbrecher *Valpo '53*
Phillip R. Stevens *WVU '75*
Randall S. Stevens *Kentucky '88*
Robert G. Stevenson *UCLA '98*
Edward R. Stike *WVU '81*
Charles L. Stoup Jr. *Ohio State '55* †
Douglas C. Stoup *WVU '83*
Christopher A. Suttile *Indiana '00*
Joseph R. Taralson *UMN Twin Cities '05*
The Alderson Family Foundation *Friend of Phi Psi*
The Foundation for Enhancing Communities *Friend of Phi Psi*
Milton O. Thompson *Wittenberg '74*
Vanguard Charitable Endowment Program *Friend of Phi Psi*
Bruce Walker *DePauw '50*
Robert L. Wallan *UCLA '81*
Timothy T. Whalen *WVU '75*
Ramsay Wiesenfeld *UC Berkeley '68*
Brian B. Williams *Ole Miss '91*
Jon M. Williams *Georgia '92*
Ryan D. Williams *UCLA '04*
Charles C. Wise III *WVU '69*
John J. Ziegelmeyer Jr. *Kansas '70*
Robert Zoland *Brandeis '91*

PHI PSI 500

ANNUAL GIVING TOTALING $500 TO $999

Chris J. Adams *Auburn '05*
Richard P. Allen *UCLA '61*
Timothy J. Alman *Georgia Tech '00*
Charles A. Arnold *Oklahoma '92*
Douglas D. Arnold *Duke '77*
Baird Foundation, Inc. *Friend of Phi Psi*
Bank of America Charitable Foundation *Friend of Phi Psi*
David B. Basler *Iowa State '64*
Frederic A. Beckley *Penn '83*
Robert G. Benjamin *Vanderbilt '84*
Ralph J. Berry *Butler '76*
Jack L. Block *Iowa State '74*
Forest J. Bowman *WVU '58*
Bret M. Brasfield *Nebraska '91*
Richard W. Brock *Ole Miss '62*
Alfred J. Cabrera *Penn '01*
Morris C. Carrington *Texas Tech '76*
Christopher D. Cassino *Rowan '00*
Austin S. Claiborne *UC Riverside '13*
Keith E. Clayton II *Wabash '04*
Brent Condrey *Friend of Phi Psi*
David C. Coquillette *DePauw '85*
Bryan A. Currie *Ole Miss '98*
Todd W. Currie *Penn State '75*
John D. Currier Jr. *Butler '89*
Dipan A. Desai *Saint Joseph's '96*
James D. Dolaway *Purdue '76*
Sean C. Dusa *Penn '98*
Brian M. Ebeling *York '97*
David E. Ekland *Alabama '76 (Iowa '79)*
Antonio Escudero-Viera *Penn '63*
Thomas P. Ewbank *Indiana '63*
William C. Faust *Lafayette '00*
Adam M. Fetterman *Brandeis '91*
James P. Fowler *CWRU '82*
Franklin Templeton Corporation *Friend of Phi Psi*
Timothy S. Gatz *Valpo '87*
Konstantinos Georgopoulos *Friend of Phi Psi*
Gerald E. Germany *ASU '89*
Robert J. Giannavola *Penn State '68*
Brian M. Gildemeyer *Delaware '14*
Brian T. Godsey *UC Berkeley '82*
Timothy J. Grosshuesch *UMN Duluth '02*
Gregory J. Gundlach *Illinois '70*
Dale N. Hackney *Washington '76*
William V. Hanzalek *Lafayette '68*
Michael P. Harding *Georgia '05*
William R. Harper *Georgia '76*
Craig F. Harrison *UCLA '78*
Edwin P. Hawes Jr. *Indiana '76*
Benjamin D. Hecke *Valpo '08*
Timothy J. Heup *South Carolina '72*
James R. Hobelman *Valpo '62*
Angela Holder *Friend of Phi Psi*
James A. Hopson *DePaul '10*
Melinda Howell *Friend of Phi Psi*
Nicholas C. Hsu *Stanford '04*
John N. Hudson *Ole Miss '69*
Susan Hudson *Friend of Phi Psi*
Mark T. Humphries *Stanford '86*
Amiyr Jackson *Penn '12*
Joseph F. Jackson *UC Berkeley '79*
Morgan E. Janes *Iowa State '07*
Ann Jensen *Friend of Phi Psi*
John P. Jensen *Iowa State '54*
Angel P. Johnson-Brebner *Friend of Phi Psi*
Kyle F. Jordan *Valpo '97*
Stafford G. Juneau III *UL Lafayette '77*
Cynthia Junker *Friend of Phi Psi*
Joseph A. Kaiser *Missouri '98*
Kathryn Kane *Friend of Phi Psi*
Gerald L. Kavka *Ohio State '66*
Robert M. Kort *Indiana '88*
David A. Kost II *Michigan State '96*
Pavlo Kostetskyy *Rowan '07*
Daniel L. Krouse *UMBC '94*
Thomas D. LaRocca *Valpo '53*
Bradley E. Layne *WVU '66*
Dana Lenhardt *Friend of Phi Psi*
George R. LePorte II *UCLA '82*
Stephen B. Lewis *DePauw '71*
James A. List *Stanford '58*
Dennis P. Little *Iowa State '79*
Timothy Long *Indiana '96*
James R. Lupton *Texas Tech '68*
Todd F. Malouf *Creighton '75*
Branden C. Mann *Purdue '01*
Woodrow G. Martin *Ole Miss '87*
James F. McCarty *UCLA '76*
David F. McCullough *Ole Miss '73*
John P. McDaniel *Wittenberg '61*
Daniel L. McKinney *Indiana '50* †
Dustin W. Meeks *Ball State '14*
Jeffrey O. Meunier *Indiana '78*
John T. Miesner *WVU '81*
Richard D. Molly *RIT '92*
Bryce A. Myers *CWRU '02*
Abby Nicol *Friend of Phi Psi*
Benjamin S. M. Nicol *Valpo '00*
North Florida Phi Psi Alumni Inc *Friend of Phi Psi*
Michael E. O'Banion *Iowa State '70*
Paul J. Oblon *Purdue '90*
Edrian Oliver *Friend of Phi Psi*
Frederick M. Paone Jr. *W&L '70*
Umang J. Patel *Iowa State '07*
Richard D. Pelletier Jr. *Rowan '02*
Terrence G. Perris *Toledo '66*
Jerry D. Perron *Butler '90*
Robert T. Platt III *Oregon State '56*
Glenn F. Potts *Washington '69*
Robert L. Puechl *Georgia '76*
Lawrence W. Putnam *Ole Miss '15*
Douglas R. Putney *Texas '80*
Gary M. Pyles *WVU '71*
Robert E. Rankin *Wittenberg '50*
William R. Reeder *Northwestern '92*
David C. Reeves *Washington '75*
Craig V. Ringstad *Iowa State '79*
Kevin D. Robertson *Oregon '77*
Mark A. Robertson *DePauw '70*
Raymond G. Rosenberger *Cal Poly '70*

Michael Roth *Friend of Phi Psi*
Thomas J. Rozycki Jr. *TCNJ '93*
David B. Sandusky *UC Berkeley '82*
Melissa Schafer *Friend of Phi Psi*
Seattle Foundation *Friend of Phi Psi*
Brian S. Selby *SMU '89*
Charles O. Shirley *Butler '76*
John W. Siebert *Indiana '76*
Gerald W. Slessor *Iowa State '69*
Hudson D. Smith Jr. *W&L '96*
Justin P. Smith *UMN Twin Cities '04*
Frank J. Steinmetz III *Iowa State '63*
Perry W. Swanson *Oregon State '66*
Steve M. Tang *Valpo '00*
Seth J. Teply *Valpo '99*
Jason Theoharis *Brandeis '14*
Mason Thimjon *UMN Twin Cities '18*
Transition Ahead LLC *Friend of Phi Psi*
Robert F. Trinka *CWRU '66*
Giffen W. Trotter *DePaul '93*
Stephen P. Upham III *Vanderbilt '72*
Samuel Vance *IU Indy '15*
David S. Vasquez III *LSU '04*
Nicholas B. Velianoff *UIC '03*
Maximilian Von Hillebrandt *Georgia '15*
Phillip E. Waddell *South Carolina '72*
Brock E. Wagehoft *RIT '15*
Matthew J. Wales *Wabash '99*
David B. Walsh *Illinois '74*
Gary K. Waters *WVU '74*
Watersedge *Friend of Phi Psi*
William L. Webb *Vanderbilt '73*
Raymond F. Widmer *Valpo '59*
Anthony B. Wiegering *Washington '94*
Scott W. Wiggins *Iowa State '80*
Charlie R. Wroblewski *Butler '08*
R. Douglas Yajko *W&J '62*
Susan Yeaman *Friend of Phi Psi*
William E. Young *Indiana 1920* †
Herbert A. Zeller *Oregon State '48*
Robert C. Zivney Jr. *Texas '68*
Andrew Zobel *UMN Twin Cities '14*

BRIDGE BUILDER SOCIETY

ANNUAL GIVING TOTALING $250 TO $499

Lawrence A. Aabel *UCLA '58*
David T. Allen *Penn '88*
Logan B. Andersen *Illinois '19*
Judith Anderson *Friend of Phi Psi*
Nicholas T. Anderson *Butler '99*
Anonymous Donor *Friend of Phi Psi*
Thomas J. Antus *TCNJ '03*
James D. Armstrong III *Alabama '66*
Dale K. Atkinson *Oregon State '74*
Robert I. Ayerst Jr. *Vanderbilt '78*
Greg M. Bailey *Indiana State '95*
Wayne R. Baker *Purdue '83*
David L. Baratta *Purdue '13*
Gregory L. Bartell *UMN Duluth '05*
Paul A. Bates *Indiana '91*
Randy F. Bergeson *Purdue '69*
Peter C. Boggs *URI '79*
Robert K. Bohlmann *DePauw '88*
Scott A. Bontempo *Ashland '81*
Michael Brady *Friend of Phi Psi*
Christopher M. Braxton *Nebraska '08*
Mark C. Brighton *CWRU '95*
Andrew D. Browne *Valpo '06*
Matthew K. Burrell *Oregon State '91*
Brett J. Byriel *Iowa State '11*
Becky Cafasso *Friend of Phi Psi*
Reid T. Campbell *W&L '87*
John R. Caswell *Iowa '70*
Fred E. Chilkowitz *Rutgers '90*
John V. Ciccarelli *CSUN '72*
Francis P. Clark Jr. *UL Lafayette '78*
Robert P. Clark *Tennessee '67*
Kathleen Clayton *Friend of Phi Psi*
John C. Cochran *Alabama '03*
Michael Coles *Friend of Phi Psi*
William E. Conway *Penn '97*
Robert S. Copouls *Valpo '02*
Jack V. Cowan *Oklahoma '52*
Rick Cusick *Friend of Phi Psi*
David L. Dahlquist *Iowa State '67*
Jeff A. Dardis *Ohio '08*
Barbara Davidson *Friend of Phi Psi*
Daniel E. Dennhardt *CWRU '04*
Thomas M. Dixon *Kentucky '96*
Lawrence F. Draper *CWRU '58*
Adam B. Dunworth *Ball State '11*
Craig J. Dupper *UCLA '89*
Nicholas A. Estrada *IU Indy '08*
Aaron M. Forni *Valpo '05*
Christopher M. Fox *DePauw '88*
Stephen C. Frank *Iowa State '80*
Thaddeus N. Fridgen *Valpo '05*
Douglas D. Fuller *Iowa State '74*
Anthony L. Funke *Purdue '79*
John S. Gabos *UMN Twin Cities '80*
David G. Gilbertson *Georgia '80*
Christopher Gillies *Friend of Phi Psi*
Daniel S. Ginsburg *Stanford '97*
Jeffrey B. Glover *CWRU '75*
Robert A. Griffith *Colgate '70*
Kevin M. Gross *Stanford '85*
Gerald J. Grossi *Michigan State '67*
Scott D. Gullquist *Vanderbilt '79*
Kyle K. Hagberg *Washington '88*
Philip B. Hall *WVU '81*
Robert O. Harding *Iowa State '74*
Robert W. Heeter *Purdue '05*
Heidelberg Materials North America *Friend of Phi Psi*
Dustin W. Henderson *Tennessee '01*
Zachary M. Herge *Toledo '10*
Isai Herrera *UC Davis '12*
David H. Hickcox *Colorado '65*
Jason S. Hoellwarth *CWRU '04*
Walter G. Hopkins III *Alabama '64*
Michael R. Hostetler *Butler '92*
Jason A. Hyne *Brandeis '03*
Richard M. Jackson *CWRU '68*
Jan C. Jacobus *Ashland '73*
Edmund P. Jensen *Washington '56*
Joshua L. Jick *Brandeis '08*
Matthew R. Johnson *Kentucky '98*
Richard A. Jones *South Carolina '72*
Ted C. Jones *Kentucky '92*
Jordan B. Kaplan *Lafayette '07*
John W. Kassing *Iowa State '74*
Michael P. Keenan *CWRU '68*
Charles W. Kimerline *Capital '11*
Timothy S. Kincaid *Oklahoma '77*
Alan J. Koffron *Iowa State '85*
Leigh Kogut *Friend of Phi Psi*
Mark G. Kopetsky *Butler '82*
Adriana LaRoche *Friend of Phi Psi*
Alex A. LaRoche *Lafayette '95*
Anthony J. Lascaro *LSU '02*
Alexander C. Levy *Penn '83*
Robert J. Link *Purdue '06*
William L. Loden *Ole Miss '75*
Jim R. Long *Indiana '65*
Robert Curtis Love *Iowa '82*
LPL Financial *Friend of Phi Psi*
Nelson A. Macken *CWRU '58*
Jonathan March *Friend of Phi Psi*
Market Development Group, Inc. *Friend of Phi Psi*
Charles H. Marsh *Georgia '76*
Ken S. Massey *Penn '96*
Scott T. Matlock *Ole Miss '89*
James A. McBride IV *Rowan '02*
Billy F. McDaniel Jr. *Texas Tech '71*
Norman T. McDonald *Georgia '93*
Kyle McGreevy *Iowa State '10*
Sean McIlvane *Georgia '18*
Guru Medasani *Friend of Phi Psi*
Mary Meehan *Friend of Phi Psi*
Anthony P. Meier *Stanford '54*
Patricia Mentzer *Friend of Phi Psi*
Scot B. Mentzer *Temple '87*
Joel M. Meyer *Valpo '91*
Timothy L. Michael *IUP '78*
Gregory S. Middlebrooks *Georgia '84*
Kyle D, Miner *Valpo '02*
Adam G. Morgan *GW '01*
Kevin P. Morris *Beloit '78*
Michael L. Mueller *CWRU '69*
Robert W. Mulloy *Kentucky '09*
Ronald S. Mundy *Iowa State '79*
Gary E. Murphy *Oregon State '67*
Marty Murray *Dayton '22*
Debbie Myers *Friend of Phi Psi*
Ford C. Myers *Texas '25*
Richard E. Napolitano *Arizona State '79*
Walter J. Nester III *URI '80*
Angela Onder *Friend of Phi Psi*
Christopher S. Orphal *Illinois State '94*
John S. Oswald II *Ole Miss '62*
William W. Ott *Valpo '54*
Matthew M. Palandech *Valpo '04*
Walter H. Palmer *Ole Miss '62*
Sandy Patterson *Friend of Phi Psi*
Marc S. Persson *F&M '97*
Todd M. Peters *Wabash '84*
Anthony T. Petro *CWRU '89*
John P. Pironti *RIT '93*
Jason C. Poole *SFA '02*
Randall H. Quale *UMN Twin Cities '79*
Gordon S. Rausser *UC Davis '85*
Linda Reed *Friend of Phi Psi*
Mark A. Reinecke *Stanford '78*
Timothy J. Ressmeyer *Valpo '79*
Martin G. Rick *Iowa '98*
Norbert C. Ritt *Valpo '59*
Nathan Roberts *UMN Twin Cities '20*
Thomas W. Roth *Iowa State '23*
James B. Rowland *Arizona '89*
W. Todd Salen *Illinois '77*
Rene Sarkhosh *USC '94*
Thompson H. Sawyer Jr. *Arizona '78*
Matthew J. Schaefer *Oregon State '04*
Wesley W. Schaub IV *Toledo '80*
Thomas E. Scott *Kansas '74*
Joel A. Seaton *Iowa State '82*
Cyndi Seger *Friend of Phi Psi*
Walter C. Service III *Penn State '52*
Kevin L. Short *Missouri '82*
Susan Silver Schlecker *Friend of Phi Psi*
Jarrett E. Simon *Ball State '16*
Harold A. Sloas Jr. *Ole Miss '62*
Don R. Soeken *Valpo '60* †
Jason B. Steele *Ashland '05*
Chad M. Stegemiller *Butler '98*
Justin R. Steinhard *RIT '00*
Mark S. Stern *CSUN '67*
Craig M. Stewart *Ohio State '61*
Paul D. Stipe *UL Lafayette '79*
James W. Stone Jr. *Virginia '74*
Rodney D. Stroope *Washington '64*
Andrew M. Swift *UCLA '17*
Timothy N. Tangen *UMN Duluth '03*
Scott E. Thompson *Butler '84*
Edward W. Tornberg *Valpo '53*
Andrew W. Turner *Iowa State '07*
Jack R. Van Boening *UCLA '17*
Erik R. Viens *URI '79*
Drew Vreeland *Delaware '18*
Anthony E. Vukusich *Indiana State '06*
Kevin M. Wagner *Valpo '11*
R. Kevin Wehber *UMN Duluth '09*
Michael H. Wendelin *Arizona '78*
James D. Westerberg *Ole Miss '24*
Tamera Westerberg *Friend of Phi Psi*
Eric W. Wiedenmann *Ashland '70*
Daniel D. Willmann *Miami '81*
Joseph P. Wills *Georgia '05*
David B. Wilson *Lafayette '79*
Christian Withseidelin *UC Berkeley '80*
Richard A. Wojkovich *Wabash '72*
Kandra Wong *Friend of Phi Psi*
Mark J. Wong *UC Davis '88*
Timothy E. Wood *Oregon State '86*
William T. Wrege *Indiana '65*
Jeffrey J. Chie Yu *Indiana '81*
Larry E. Zaiser *Michigan State '62*
Anna Zelinsky *Friend of Phi Psi*

† *Member has joined Chapter Eternal*



Letter from the CEO

Brothers,

There are times when the purpose of our work becomes unmistakably clear.

Sometimes it is a conversation with an undergraduate brother trying to navigate his young adult life. Other times, it is an alumnus reflecting on how a pledge brother has stuck with him through tough times even years after graduation. And increasingly, we are reminded of Phi Psi's purpose when we look at the data. Data is telling us a consistent story: young men today are searching for human connection, for practical purpose, and for opportunities to lead.

We have been at this fraternity work since 1852, but I am convinced that the need for what Phi Kappa Psi offers has never been greater.

At a time when many question the value of traditional higher education, research continues to affirm the impact of meaningful community. Students who are connected to brothers, to mentors, to peers, and to a shared set of values are more likely to persist, to lead, to stay in college, and to contribute beyond themselves. When fraternity is done right, it can make the difference young men need. It creates environments and opportunities where brothers are challenged, supported, and ultimately prepared to live good lives. When I look at the data, I am reminded of the purpose of our work, and it brings the importance of that work to the forefront.

Over the past year, we have focused on a clear and intentional strategy to pursue our mission more aggressively. Our focus centers on two fundamental practices: Revenue Generation and Impact Generation. These anchor our 2025–2027 Strategic Objectives and ensure that every decision we make is aligned with advancing the mission.

On the revenue side, our work is focused on building a sustainable and growing base of support. This includes expanding our alumni donor community, strengthening retention, and placing a renewed emphasis on planned giving to fuel the long-term future of Phi Psi. We are seeing meaningful progress. In the past year alone, our donor retention reached 59%, well above industry standards, and commitments to planned giving exceeded our annual goal, a reflection of the confidence our donors have in both our direction and our discipline.

Equally important is how those resources are put to work.

Our impact strategy is centered on ensuring that every undergraduate has access to experiences that shape who they become. This begins with leadership development, where we are working toward 75% chapter participation in leadership programming and significantly expanding in-person opportunities. It extends to strengthening the chapter experience through Chapter Development Services, where we are steadily increasing adoption and support across the country. And it is reinforced through scholarships and academic initiatives designed to reduce barriers and reward excellence.

These priorities are not independent efforts but are interconnected investments in the same outcome: better prepared, more capable, brothers who emerge from college with purpose.

The progress we are seeing is encouraging. More chapters are engaging. More students are participating. More donors are giving. Perhaps most importantly, the clarity of our approach allows us to measure what matters and to continuously improve how we deliver on our mission.

None of this happens without you.

Your support, whether through your time, your advocacy, or your financial investment, fuels this work. It allows us to expand access, elevate quality, and ensure that the promise of Phi Kappa Psi is not limited to a few, but available to all who seek it. Every contribution is, at its core, an investment in our brothers – in their growth, their leadership, and their ability to make a difference in the world around them.

As we look ahead, we do so with confidence. Not because the work is easy, but because the path is clear. We know what matters. We know where we are going. And we are building the capacity to get there.

Fraternity, at its best, is one of the most powerful forces in engaging young men in experiences that will pay dividends throughout their life. Together, we have the opportunity and the responsibility to ensure that Phi Psi continues to adapt and grow to meet the needs of future generations.

Fraternally and gratefully,



Benjamin S. Nicol, CFRE *Valpo '00*
Chief Executive Officer

BOARD OF TRUSTEES

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.

Chairman Emeritus
Wayne W. Wilson *Michigan State '59*

Chairman
Timothy P. McCourt *Washington '78*

Vice Chairman
Randall W. Schnack *UCLA '80*

Treasurer
Bruce A. Jackson *CWRU '70*

Secretary
John H. Pierce *Lafayette '78*

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Robert W. Dudley *Illinois '74*
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Christopher J. Hedberg *Colorado '89*
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Charles J. Maxwell Jr. *Iowa '83*
David S. Moyer *Alabama '91*
John R. Murray Jr. *Vanderbilt '71*
Ari J. Officer *Stanford '06*
Michael J. Schroeder *UMN Twin Cities '80*
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John D. Watkins Jr. *Miami '79*
Jerry C. Watson *Alabama '64*

Trustees Emeriti
James C. Denny *W&J '68*
James E. Hagler *Tennessee '98 (Vanderbilt '58)*



Advancing Our Strategic Priorities

The Foundation continues to make meaningful progress against its two core strategic priorities — Revenue Generation and Impact Generation.

Over the past year, we have fully transitioned from planning into disciplined execution. Strategies are now actively led by staff and volunteers, supported by clear accountability structures, and aligned with measurable outcomes. Multi-year objectives have been translated into annual action plans with defined milestones and key performance indicators allowing us to track progress in real time and direct resources where they will have the greatest impact.

Revenue Generation

How we most effectively and efficiently raise funds, manage current assets, and generate additional resources.

Scale and Strengthen Chapter Development Services

Emphasize Planned Giving

Increase Alumni Donor Base

Impact Generation

How we utilize current and future funds to have the greatest impact on our undergraduate and alumni members.

Broaden Scholarship Offerings & Increase Overall Awarding

Innovate & Scale Housing Support

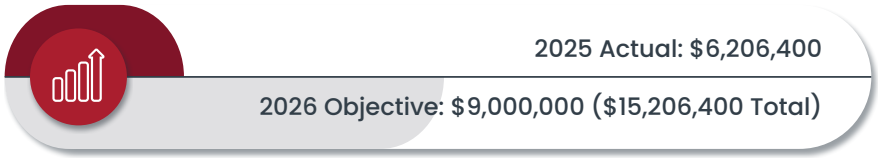
Enhance & Expand Leadership Programming

REVENUE GENERATION

BUILDING THE ENGINE FOR LONG-TERM IMPACT

Our work to strengthen the Foundation's financial capacity is showing encouraging momentum:

Planned Giving continues to lead the way, with 29 new commitments secured in 2025, exceeding our annual goal of 20. These commitments represent more than $6.2 million toward our $30 million multi-year objective, positioning us strongly for future growth. Chapter Development Services (CDS) adoption continues to expand, with 15 groups engaged in 2025, progressing toward our goal of serving 75% of qualified chapters. This work remains foundational to strengthening alumni engagement which remains a priority, with 1,586 alumni donors contributing in 2025 and retention improving to 59%, approaching our 60% target. While participation growth remains a challenge, these trends reflect a strengthening base of committed donors.



2025–2027 STRATEGIC OBJECTIVES

Emphasize Planned Giving

Generate 50 new planned gift **commitments totaling $30,000,000**



Emphasize Planned Giving

Generate 50 new planned gift commitments totaling $30,000,000



Scale and Strengthen Chapter Development Services

Achieve 75% adoption of CDS services by qualified groups **(35 Groups)**



Increase Alumni Donor Base

Increase alumni donor participation to 3.5% (~3,500) and improve alumni donor retention to 60%



Increase Alumni Donor Base

Increase alumni donor participation to 3.5% and **improve alumni donor retention to 60%**

IMPACT GENERATION

EXPANDING REACH AND DEEPENING OUTCOMES

The Foundation is advancing initiatives that directly shape the undergraduate experience:

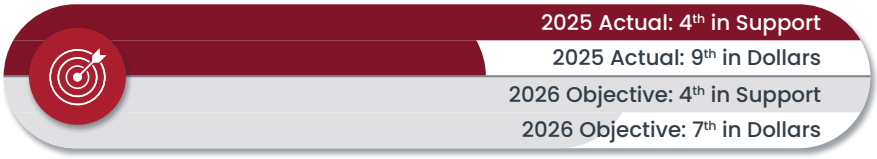
Leadership Programming is scaling meaningfully, with 48 chapters represented in 2025, significantly exceeding our annual target of 30 and moving us closer to our long-term goal of 75% participation. In-person programming continues to grow, reaching 64 students this year, with significant opportunity ahead. Housing support efforts are gaining traction, with 23 facilities now evaluated for educational funding eligibility, surpassing our annual target. Additionally, seven house corporations received operating support, strengthening the environments where our members live and learn. Scholarship distribution remains an area of focus, with 56% of available chapter-designated funds awarded in 2025. Increasing this percentage is a key priority to ensure that donor-funded resources are fully activated in support of academic success.



2025–2027 STRATEGIC OBJECTIVES

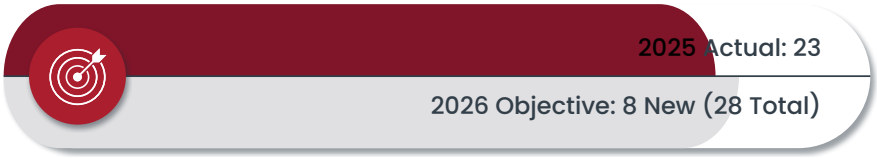
Broaden Scholarship Offerings & Increase Overall Awarding

Disburse 90% of available chapter-designated funds annually



Broaden Scholarship Offerings & Increase Overall Awarding

Ranked in top 5 of all men's fraternal organizations for total annual scholarship support and scholarship dollars granted per undergraduate members.



Innovate & Scale Housing Support

Determine the educational funding percentage for 75% of all Phi Psi-owned facilities **(33 Chapters)**



Innovate & Scale Housing Support

Provide operating grants to 25% of house corporations with Phi Psi-owned facilities **(11 Chapters)**



Enhance & Expand Leadership Programming

Achieve 75% chapter representation with at least one member participating **(71 Chapters)**



Enhance & Expand Leadership Programming

Increase the number of members impacted through **in-person programs by 300% (108 Students)**

Looking Ahead

While there is still important work to be done, the trajectory is clear.

The Foundation is building a stronger financial engine while simultaneously expanding the reach and effectiveness of its programs. This progress is only possible because of the continued commitment of our donors and volunteers. Together, we are not only advancing strategic goals, but we are also equipping more brothers to lead purposeful lives of character, service, and impact.



WAYS TO MAKE AN IMPACT

1 CASH CONTRIBUTIONS

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
Indianapolis, IN 46226

2 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.

3 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.

4 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).

5 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.

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**.

THE CREED OF
PHI KAPPA PSI

I believe that Phi Kappa Psi is a brotherhood of honorable men, courteous and cultured, who pledge throughout their lives to be generous, compassionate, and loyal comrades;

I believe that I am honor bound to strive manfully for intellectual, moral, and spiritual excellence; to help and forgive my Brothers; to discharge promptly all just debts; to give aid and sympathy to all who are less fortunate;

I believe that I am honor bound to strengthen my character and deepen my integrity; to counsel and guide my Brothers who stray from their obligations; to respect and emulate my Brothers who practice moderation in their manners and morals; to be ever mindful that loyalty to my Fraternity should not weaken loyalty to my college, but rather increase devotion to it, to my country, and to my God;

I believe that to all I meet, wherever I go, I represent not only Phi Kappa Psi, but indeed the spirit of all fraternities; thus I must ever conduct myself so as to bring respect and honor not to myself alone, but also to my Fraternity;

To the fulfillment of these beliefs, of these ideals, in the noble perfection of Phi Kappa Psi, I pledge my life and my sacred honor.

OUR VISION

Honorable men leading lives of character, service, and impact.

MISSION

Raise, invest, and grant resources to equip every brother to lead a purposeful life of character, service, and impact in his community.

PHI KAPPA PSI
FOUNDATION

5395 Emerson Way, Indianapolis, IN 46226
317.275.3400 | pkpfoundation.org