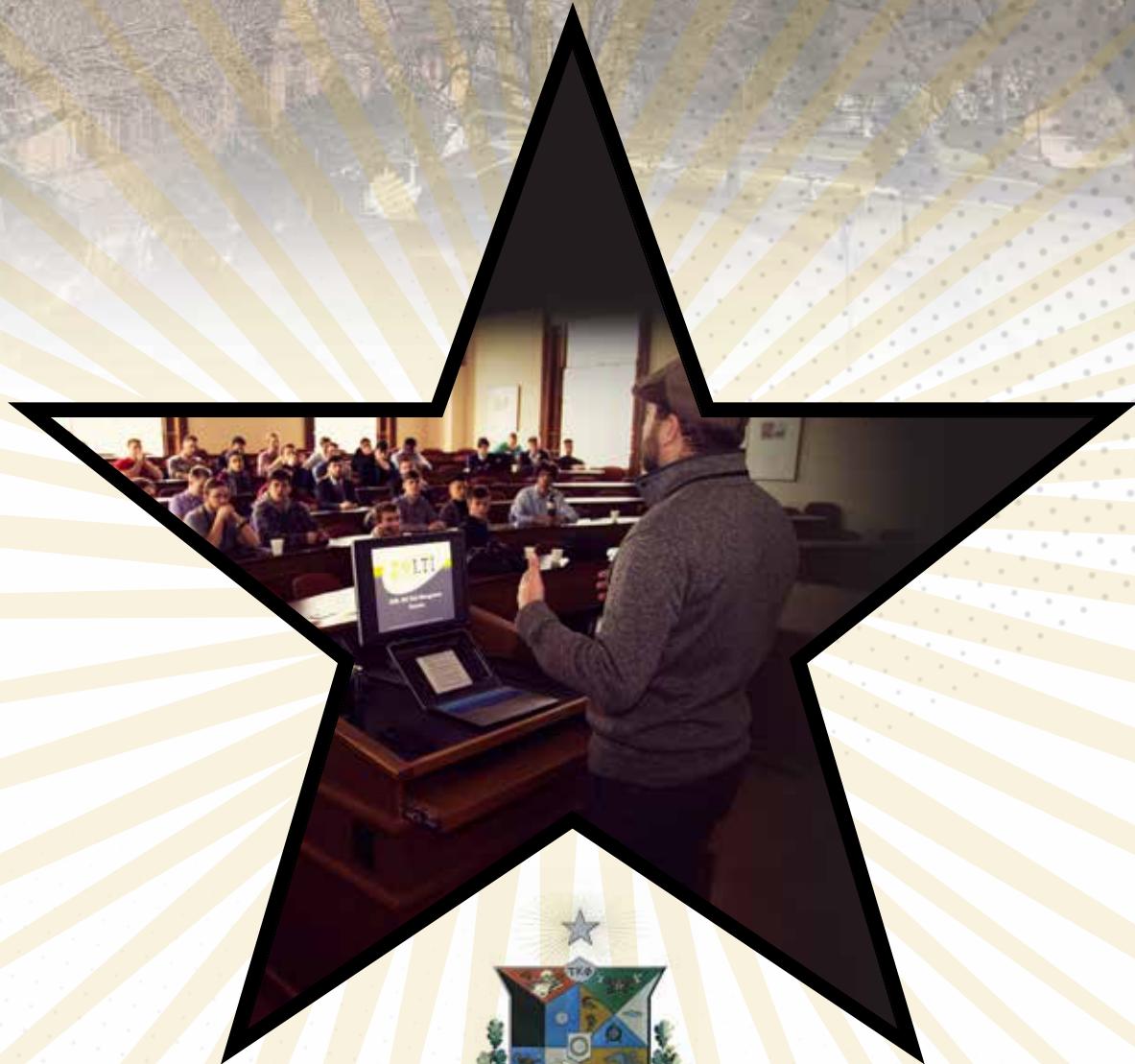


# **LEADERSHIP FOR OUR FUTURE**



**ZETA PSI**  
**Educational Foundation**  
**2019 Annual Report**

# ZETA PSI

## Educational Foundation

### Headquarters Staff

#### Executive Director

M. Lauck Walton  
exec.dir@zetapsi.org

#### Associate Executive Director

Tyler Boisvert  
boisvert@zetapsi.org

#### Director of Communications

Max Anderson  
anderson@zetapsi.org

#### Director of Membership Education

Katie Schremp  
schremp@zetapsi.org

#### Senior Regional Education Consultant

Bill Weisenhorn  
weisenhorn@zetapsi.org

#### Regional Education Consultant

Dominic LoPiccolo  
lopiccolo@zetapsi.org

#### Regional Education Consultant

Kyle Walker  
walker@zetapsi.org

#### Fundraising Consultant

Barth Gillan  
gillan@zetapsi.org

#### Consultant

Bob Baer  
baer@zetapsi.org

#### Accounting

Tony Hodgson  
accounts@zetapsi.org

# WELCOME



Zeta Psi International Headquarters Staff

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## Contributors

#### Editor-in-Chief:

**Max Anderson**  
(Alberta '15)

#### Copy Editor:

**Randy Schein**  
(Syracuse '80)

#### Design and Production:

**Monarch Communications**

#### Editor:

**Ira Berkowitz**  
(Gamma '82)

#### Contributors:

**David Busacca**  
(Lehigh '73)

**Barth Gillan**  
(McGill '85)

**Katie Schremp**

**Lauck Walton**  
(RPI '84)

# A Message From the Foundation President

It's been a busy year at ZPEF. As we prepare for the mid-winter Board Meetings in January, we finish up much of the administrative work for the new board structure mentioned in my previous note. While not exciting narrative it is the necessary work as we pursue our new structure.

One of the more important efforts is a new Strategic Plan. This committee, headed up by former President/Phi Alpha Les Mann is an important step to provide a consistent, organization-wide beacon to all our actions in the near future.

All aspects of Zeta Psi touch two main components: teaching and fundraising.

We have always taken our responsibility to educate and enhance our members with necessary exposure to life lessons. This process is concentrated in our annual January Kirby Leadership Conference where we place special emphasis on the actual leaders of our chapters, the Phis. This concentrated 3-day focus emphasizes the responsibilities, advantages, benefits and leadership that being in charge of an undergraduate chapter represents to these young men.

Few 19, 20-year-olds get the exposure and opportunity that being an officer provides these men. This is particularly so for the Phi. It is the Foundation's objective to enhance this experience and show these leaders the correlations this experience provides for future life focus. The hands-on activity, enhanced by supporting guidance and instruction from IHQ and the Foundation, is an opportunity few other college-age men obtain.

The significance and scope of that experience is borne out by the lifelong bonds many brothers forge at that time. Indeed, that time together is the foundation of the concept of "Zete for Life" in motto and practice. As these men solidify the lessons taught at the chapter as they progress through life, it informs their view of the value of the fraternity experience. And that value is manifest by the donation practices of those Elders. Donating, indeed fundraising specifically, is the second pillar of our organization.

This should strike a chord with you because you are already a supporter. Whether you support monthly or annually, with small gifts or a large one, to your local chapter and/or the International organization, you are acknowledging what Zeta Psi has done for you. Thank you for that! Please maintain your

commitment in being a Zete for life, but also help us to encourage others to join you so that future brothers can also have your experience."

Our Fundraising objective is not to acquire large one time donors. It is to connect Elders back to the Zeta Psi experience and through that, they understand the value of annual support of all levels. Fundraising is obviously about money, but, it's first about value. If that brother does not believe in Zeta Psi's fundamental objectives and identifies and appreciates the impact of that experience, he is not going to contribute... now or later.

Without doubt, it is more important for Zeta Psi---to its organization, it's brothers and Elders, and particularly to its undergraduates—to engage its members throughout their adult lives. You are a Zete for LIFE! Shouldn't your response to those lifelong lessons mirror those experiences?

If you are a donor, thank you for being a Zete for Life! If not, it's never too late to make a gift no matter the amount: monthly or annually; chapter or IHQ; big or small. Acknowledge what Zeta Psi has done for you in a way that allows future brothers to also have that experience - be a Zete for life!

Dave Busacca (*Lehigh '73*)  
Zeta Psi Educational  
Foundation President



## Board of Trustees

### David Busacca

Lehigh '73  
President

### Tom Roerden

Cornell '83  
Vice President

### Will Woldenberg

Tulane '07  
Secretary

### Maurice Ducoing

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Trustee

### Phil Gass

NYU '00  
Trustee

### Stan Gorski

Syracuse '86  
Trustee

### Les Hilger

Stanford '65  
Trustee

### Akil J. Middleton

MIT '08  
Trustee

### John Spohn

RPI '81  
Trustee

### Jared Sunshine

Columbia '03  
Trustee

### Dylan Thomas

UCLA '04  
Trustee

### Les Mann

Washington '73  
Past President

### Dan Homoncik

UOIT '10  
Canadian Foundation Representative

# A Message From the Executive Director

## Dear Zetes:

2019 has been another outstanding year for the Foundation as Zeta Psi continues to deliver the services that our members desire.

The LTI program provides leadership training and professional development opportunities for all members. For new members, it provides important safety information which teaches them how to understand their obligation to a healthier and safer collegiate experience for each chapter's members, new members, and guests. The program offers in-person coursework in North America and Europe with customized content for each individual chapter's local and regional specifications.

Our President's Conference, which is underwritten by a generous grant from the Kirby Foundation, brings together all chapter presidents at the start of their terms for a four-day onboarding process. The Annual Convention LTI program, which has been supported for more than a decade with generous contributions from Alan and Ruthie Rice, brings together all of our chapter leaders and helps them hone the skills that will better prepare them to succeed in college and in the professional world afterwards.

The Foundation provides scholarships for students attending college in the United States. The need for scholarships continues to grow and Zeta Psi increased the amount of its scholarship grants by more than 20% over the prior year. The Foundation is putting its funds to work for its intended purposes – and this helped us put more dollars in student hands in 2019.

The Foundation also supports the chapter visitation program, in which we send a Leadership Consultant to meet with every Zeta Psi chapter twice a year. We also support the chapter leaders with weekly professional one-on-one phone meetings. We then summarize these conversations and the subsequent takeaways in our Basecamp system. (Basecamp is a software system that allows us to document all of our interactions in one place so as to keep track of our progress.) The professionalism we teach our chapter leaders has made a profound difference in our members' maturity and will continue to give them an excellent edge in school and beyond.

The Foundation is purposefully growing its programs, and therefore, we are starting a multi-year process to reenvision how we ask our members for additional financial support.

These results come from generous donors like you and we thank you for your generosity.

On behalf of the Foundation, we ask that you consider increasing your support and help us to identify other Zetes that can help make Zeta Psi's chapters and members better prepared for the challenges to come.

Respectfully yours in TKPhi,

Lauck Walton (*RPI '84*)  
Executive Director  
Zeta Psi IHQ



Lauck Walton, Zeta Psi IHQ



## Zeta Psi Heritage Society

Zeta Psi offers several different giving clubs and opportunities, with each being representative of a unique aspect of a Zete's life. One of these, Zeta Psi's Annual Fund, allows brothers the opportunity to continue their involvement in the organization into their professional lives and beyond. Another, the 1847 Pledge, encourages Zetes from all walks of life to participate by making a nominal donation depending upon each brother's individual ability to do so.

The Heritage Society, on the other hand, allows one to continue his journey with Zeta Psi even after his passing. The Heritage Society offers special recognition to members who have pledged to provide a final gift to the endowment fund, supporting Zeta Psi in perpetuity with pledges to either the Zeta Psi Educational Foundation or the Zeta Psi Foundation of Canada. To date, members of the Heritage Society have pledged a total of \$19,679,872 through the program.

At this year's 172nd Annual Convention in Baltimore, we were honored to welcome eight new members into this special giving club – including our first member from the University of Paris:

- Clay Albers, Texas '02
- Bob Baer, Lafayette '78
- Pablo Boulay de Santiago, Paris '20
- Michael Hasland, Oxford '21
- Kieran Morris, Dublin '22
- Thomas Ritter, Oxford '19
- Dustin Slack, Texas '93
- Bill Weisenhorn, American '16

Zeta Psi would like to express its profound appreciation to all 473 members of the Heritage Society.

# 2018-2019 Scholarship in Review

The following chapters have a specific fund dedicated to their chapter:

**Case Western**  
Nu Scholarship Fund

**Columbia**  
Robert T. Goldberg Leadership Fund

**Cooper Union**  
Kappa Phi Fund

**Cornell**  
Burkhardt Family Scholarship Fund  
Psi General Fund  
Tom & Donna Jewett Scholarship Fund

**Dartmouth**  
Frederick Cole Endowment Fund

**General**  
William R. Duryee Scholarship Fund

**Illinois**  
Zahn Olmstead Endowment Fund

**Lehigh**  
Tau Delta Elders Fund

**Middlebury**  
Baldwin/Landon Memorial Fund

**MIT**  
Owen M. Williams Fund

**NC State**  
Sigma Gamma Fund

**NYU**  
Albert Valentine Fund  
Harold Finley Fund  
Virgil & Moody Gates Fund  
Leila & William Mackay Memorial Fund

**Princeton**  
Omicron Epsilon Memorial Fund

**Purdue**  
Tau Gamma Scholastic Achievement Fund

**RPI**  
Pi Endowment Fund  
Ira Richer Fund

**Rutgers**  
Donald M. Moore Delta Fund  
Delta Endowment Fund

**Stanford**  
Mu Endowment Fund

**Syracuse**  
Charlie Burrows Scholarship Fund

**UC Berkeley**  
Witter Iota Fund

**UCLA**  
Sigma Zeta Scholarship Fund

**UIC**  
T. Ryan Sigma Phi Fund

**Virginia Tech**  
Jud Browning Scholarship Fund

**Yale**  
Eta Fund  
Scott Puddy Fund

Over the past 75 years, the Zeta Psi Educational Foundation has awarded scholarships to deserving students in the United States. The Foundation is funded in part by our Fraternity's generous donors.

This past year, the Zeta Psi Educational Foundation awarded a total of \$54,000 to 93 individual recipients. These awards, ranging from \$250 to \$1,000, are given based on academic excellence, leadership in Zeta Psi, involvement in other campus activities, and financial need. With the ever-rising costs associated with higher education, their impact cannot be understated. To quote one recent recipient: "I'm incredibly grateful to receive

this scholarship award and cannot thank Zeta Psi enough for helping to make my college experience more affordable. It means a lot to me."

Applications open early in both the fall and spring academic semesters and can be accessed at [www.zetapsi.org/scholarships](http://www.zetapsi.org/scholarships). Zeta Psi's Scholarship Committee, led by Dylan Thomas (UCLA '04), reviews all submitted applications and determines the most worthy. Elders interested in volunteering for the committee should contact Zeta Psi's Executive Director.

For more information on how to set up a dedicated fund for your chapter, please contact Barth Gillan (gillan@zetapsi.org).



Brothers gathered for 2019's Pacific Northwest LTI in Vancouver, BC.

# 2018-2019 Scholarship in Review

## Zeta Psi Educational Foundation

General Scholarships Awarded

Fall 2018/Spring 2019

First Name	Last Name	Chapter
Sang Il	Ahn	University of Chicago
Luke	Baker	University of Pennsylvania
Daniel	Baldwin	Georgetown University
Nicholas	Barber	University of California, Davis
Eric	Birnbaum	Tulane University
Stephen	Bojack	University of Washington
Jack	Browning	Virginia Polytechnic Institute
Julian	Bustillo	Tulane University
Stephanie	Cantor	Not Listed (Non-Member)
Kyle	Cassara	Georgetown University
Juan Pablo	Castella	University of Chicago
David	Chen	University of Chicago
Carlo	Chiesa	University of Pennsylvania
Spyridon	Coffinas	New York University
Joseph	Cohen	University of Maryland
Michael	Coiro	New York University
Greg	Curtan	Case Western Reserve University
Christian	de Abreu	University of Pennsylvania
Bryan	Deneen	Georgetown University
Benjamin	Doughty	University of Michigan
Henry	Eckhouse	Tulane University
Simone	Feroce	University of Texas
Adam	Frank	American University
Hanley	Frantz	Princeton University
Seth	Gainsburg	Cornell University
Parkash	Garcha	Marist College
Dario	Garone	American University
Sivert	Glarum	University of Michigan
Shane	Gooding	Princeton University
Deepak	Gupta	University of Chicago
Sai Deepak	Gupta	University of Chicago
Christopher	Hackney	University of Michigan
Keegan	Hahn	University of North Carolina
Joseph	Hnath	Case Western Reserve University
Andrew	Hubina	Worcester Polytechnic Institute
Eli	Hulse	New York University
Liam	Hurley	Virginia Polytechnic Institute
Dan	Kesler	University of Pennsylvania
Amarik	Khosa	University of California, Berkeley
Anthony	Kuykendall	American University
Alexander	Kyriakides	New York University
Dante	LaCounte	University of California, Santa Barbara
Brian	Lee	The Cooper Union
Austin	Leikvoll	University of Minnesota
Charles	Lind	Worcester Polytechnic Institute
Michael	Lucatorto	American University
Jake	Mania	American University

First Name	Last Name	Chapter
Tyler	Marsh	Worcester Polytechnic Institute
Thomas	McCarthy	Worcester Polytechnic Institute
Mason	McDowell	Michigan State University
Chris	McKinney	Massachusetts Institute of Technology
Parker	Mee	University of Chicago
Jorge	Mirabelli	Case Western Reserve University
Henrique	Mulinari	University of Pennsylvania
Jonathan	Nghiem	University of Minnesota
Chirag	Nijjer	Lafayette College
Daniel	O'Brien	University of California, Davis
Shane	O'Brien	University of Illinois
Glory	Okwori	Not Listed (Non-Member)
Bryce	Onozuka	Virginia Polytechnic Institute
Sinan Rasim	Onukar	University of Pennsylvania
Tikhon	Pachin	Purdue University
Stefan	Palylyk	New York University
Ashish	Patel	Georgetown University
Keith	Pecoraro	Binghamton University
Mrinal	Ramsaha	Cornell University
Alec	Reginato	University of Minnesota
Bryce	Rogers	American University
Joseph	Roschella	University of Maryland
Gilbert	Saldana	Georgetown University
Christopher	Santos	Binghamton University
Julian	Sauvage	Virginia Polytechnic Institute
Nathan	Seaton	Nebraska Wesleyan University
Tyler	Sharp	Nebraska Wesleyan University
Vasco	Silveira	University of Pennsylvania
Carson	Smith	Virginia Polytechnic Institute
Jake	Smith	Worcester Polytechnic Institute
Aidan	Smolar	The Cooper Union
Ryan	Spalding	New York University
Elijah	Sutanto	University of Chicago
Marc	Teitelbaum	Lafayette College
Nate	Teitler	Nebraska Wesleyan University
Andrew	Tenczar	University of Washington
Timothy	van Dover	Cornell University
Alexander	Vraspir	Nebraska Wesleyan University
Kat	Walther	American University
Aaron	Weinberg	Case Western Reserve University
Erik	Widjaja	University of Minnesota
Andrew	Williamson	Virginia Polytechnic Institute
Graham	Wobig	Virginia Polytechnic Institute
Nicholas	Young	Georgetown University
Jake	Yun	Michigan State University
Daniel	Zabari	The Cooper Union

This list only includes scholarships awarded to students in the United States by the Zeta Psi Educational Foundation.



1847 Pledge Champions pose with their chapters' respective championship belts!

## THE 1847 PLEDGE CHALLENGE

The 1847 Pledge was launched in 2017 with one simple concept in mind – to encourage all brothers in every chapter to donate \$18.47 in honor of Zeta Psi. Throughout the past several years, over \$75,000 has been raised through the 1847 Pledge to support Zeta Psi's Leadership Training Programs.

As those familiar with the 1847 Pledge know, the 1847 Pledge Challenge was also introduced to celebrate Zeta Psi. Since we place our emphasis on the amount of brothers participating as opposed to total dollars raised, the challenge encourages all brothers to participate regardless of their ability to give.

2018's challenge introduced the addition of championship belts for top chapters in various categories: Overall Champion, Top American Chapter, Top Canadian Chapter and Top Young Chapter.

The 2018-2019 academic year saw a number of significant accomplishments in the world of Zeta Psi. One of these accomplishments was the chartering of the Psi Omicron Chapter at the University of Paris. Now that we have three active chapters in Europe, we introduced a Top European Chapter belt at this year's 172nd Annual Convention.



Queen's University - Top Young Chapter



WPI - Overall 1847 Pledge Champions!



RPI - Top American Chapter

Congratulations to the following chapters for bringing home the 1847 Pledge Challenge belts in their respective categories:

**Top Young Chapter**

Queen's (Theta Psi)  
6 donors, \$192.09 raised

**Overall Champion**

WPI (Pi Tau Chapter)  
90 donors, \$2,983.37 raised

**Top American Chapter**

RPI (Pi Chapter)  
86 donors, \$3,828.37 raised

**Top Canadian Chapter**

Waterloo/Laurier (Alpha Theta)  
51 donors, \$1,625.37 raised

**Top European Chapter**

Trinity, Dublin (Theta Omicron)  
8 donors, \$204.29 raised

Thanks to the participation of 735 individual donors from 60 total chapters, a record \$32,144.35 was raised with 2019's 1847 Pledge. Thank you to everyone who participated, especially Will Woldenberg/Entegrit for sponsoring challenge benchmark prizes.

The 1847 Pledge Challenge will return in 2020!



Waterloo/Wilfred Laurier - Top Canadian Chapter



Trinity College, Dublin - Top European Chapter



## Meet the New Membership Education Director

I want to take this opportunity to share a little about myself and my hopes for the educational future of Zeta Psi Fraternity. I am a member of Kappa Delta Sorority, and like many current and former Zeta Psi staff members, my love of my undergraduate experience sparked an interest in working with fraternal groups as a career. I attended graduate school at Western Illinois University where I worked as a Graduate Advisor in the Fraternity/Sorority Life Office. I worked directly with the United Greek Council, Interfraternity Council, and Risk Management committees while also facilitating an undergraduate leadership course and graduate level group dynamics course.

After graduate school I worked for another fraternal group as the main staff member for the premier summer workshop that hosted about 2,000 participants. I also worked closely with an E-Learning developer to create six online courses for officer training.

I joined Zeta Psi's staff at the end of April 2019 as the Director of Membership Education. During my time on staff, I have reviewed all the prior Leadership Training Institute (LTI) course content and have begun to make edits to the established coursework and create new content when needed. I have been using my degrees in Education and College

Student Personnel to focus the curriculum development on realistic and manageable learning outcomes that focus on the needs of the current college student. My goal is to utilize our valuable in person time during LTIs and Kirby Phi's Conference to advance the conversations among the undergraduate members to being active healthy members of Zeta Psi, their campus, and community.

With that goal in mind, I am working toward implementing more online education so that our in-person time may be utilized for difficult conversations that cannot be facilitated online. Zeta Psi has been utilizing EverFi's GreekLifeEdu course to educate all



**9**  
Regional LTIs  
in 3 countries

**45**  
chapters  
at LTIs

**471**  
LTI attendees

New Members on situations they may face regarding alcohol, hazing, and sexual assault. EverFi has been a great partner in providing an online learning system with new options for additional learning being continually created. However, I want to explore other online learning systems that may better fit the needs of Zeta Psi undergraduate and Elder membership. This is a large task that will require careful consideration, time, and resources.

I have been working with the Membership Education Committee to discuss these new learning avenues and continue to utilize the expertise of Elder members. We will continue to invite trained Elders to facilitate coursework during leadership

programs as well as provide networking opportunities for all members during the Regional LTI programs. We are also working to expand the Elder educational track at the Kirby Phi Conference and Convention to integrate the learning between undergraduates and Elders.

As a dedicated member of the fraternal community, my hope is that all of our members have safe, fun, and educational experiences as a result of their lifelong membership. As the needs of collegiate and Elder members continue to evolve, so must the education and experiences the international fraternity provides. Let us all work together to continue providing positive and life changing experiences for each member.

Fraternally,  
Katie Schremp  
Director of Membership Education



Katie Schremp



Big and little brothers bonding over lunch in Baltimore, MD.

## Big/Little Brother Sponsorships

As those of us fortunate enough to attend convention as an undergraduate can attest to, this annual gathering of brothers is truly an unforgettable experience. The opportunity to attend invaluable leadership training sessions, network with Zetes from around the world, and experience the true breadth of the international fraternity cannot be overstated.

That being said, the full Convention experience can be expensive for an undergraduate. Luckily, Zeta Psi has a Big Brother sponsorship program to ease the financial burden of an undergraduate attending Convention. By contributing to a Big Brother sponsorship, elders can directly help an undergraduate brother attend a Zeta Psi Convention.

Since the program's inception in 2014, over 100 undergraduate brothers have been able to attend Convention thanks to the selfless contributions of our Big Brother sponsors. We would like to take this opportunity to recognize all 18 of this year's Big Brothers:

Stuart Bowers, Maryland 1981  
Perry Cosier, Virginia Tech 2007  
Les Hilger, Stanford 1965  
Tony Hodgson, Toronto 1983  
James Lugar, Maryland 2004

Gary Mootz, Penn State 1963  
Corey Nicholson, Toronto 1979  
Andy Nunez, UT, Austin 1994  
Bob O'Donnell, MIT 1985  
Alan Phipps, Case Western Reserve 1990

Evan Pressman, WPI 1984  
C.R. Roberts, Washington 1970  
Jay Rothberg, American 1969  
Dylan Thomas, UCLA 2004

Thanks to this year's Big Brother Sponsors, the following Little Brothers were able to come to Baltimore, meet Zetes from around the globe, and benefit from the Convention experience:

Cole Bradley, Toronto 2021  
Cian Fogarty, Trinity 2021  
Matthew Gao, UIUC 2021  
Chandler Georgiou, Rutgers 2020  
Michael Hasland, Oxford 2021  
Jake Heilman, UIUC 2020

Clarke Keenan, Western 2021  
David Kwon, UT, Austin 2020  
Jame Lemanis, Rutgers 2021  
Kieran Morris, Trinity 2022  
Shane O'Brien, UIUC 2020  
Rafik Ouahid, Paris 2020

Austin Parker, Michigan State 2020  
Deepan Patel, Rutgers 2020  
Gregory Pearson, Western 2020  
Timothy Samson, Toronto 2020  
Timothy Wachter, UIUC 2020  
Graham Wobig, Virginia Tech 2020

For information on how you can change the life of an undergraduate with a Big Brother sponsorship, contact Barth Gillan ([gillan@zetapsi.org](mailto:gillan@zetapsi.org)).

# Big Brother/Little Brother 2019



Sign welcoming Big/Little brothers to Zeta Psi's 172nd Annual Convention in Baltimore, MD.  
Big and Little Brothers added their signatures to the list as they checked-in to the convention.

## Welcome to our Little Brother Convention Attendees

Cole	Bradley	Theta Xi	2021	<i>Col</i>
Cian	Fogarty	Theta Omicron	2021	<i>Cian Fogarty</i>
Matthew	Gao	Alpha Epsilon	2021	<i>Matthew Gao</i>
• Chandler	Georgiou	Delta	2020	<i>Chandler Georgiou</i>
Michael	Hasland	Iota Omicron	2021	<i>Michael Hasland</i>
• Jake	Heilman	Alpha Epsilon	2020	<i>Jake Heilman</i>
• Clark	Keena	Theta Phi	2021	<i>Clark Keena</i>
David	Kwon	Iota Alpha	2020	<i>David Kwon</i>
• Jake	Lemanis	Delta	2021	<i>Jake Lemanis</i>
Kieran	Morris	Theta Omicron	2022	<i>Kieran Morris</i>
Shane	O'Brien	Alpha Epsilon	2020	<i>Shane O'Brien</i>
Rafik	Ouahid	Psi Omicron	2020	<i>Rafik Ouahid</i>
• Austin	Parker	Zeta Tau	2020	<i>Austin Parker</i>
• Deepan	Patel	Delta	2020	<i>Deepan Patel</i>
• Gregory	Pearson	Theta Phi	2020	<i>Gregory Pearson</i>
Timothy	Samson	Theta Xi	2022	<i>Timothy Samson</i>
Timothy	Wachter	Alpha Epsilon	2020	<i>Timothy Wachter</i>
• Graham	Wobig	Alpha Pi	2020	<i>Graham Wobig</i>

## Thank you to the Big Brothers who sponsored them

Stuart	Bowers	Phi Epsilon	1981	<i>Stuart Bowers</i>
Perry	Cosier	Alpha Pi	2007	<i>Perry Cosier</i>
Les	Hilger	Mu	1965	<i>Les Hilger</i>
Tony	Hodgson	Theta Xi	1983	<i>Tony Hodgson</i>
James	Lugar	Phi Epsilon	2004	
Gary	Mootz	Pi Sigma	1963	
Corey	Nicholson	Theta Xi	1979	<i>Corey Nicholson</i>
Bob	O'Donnell	Rho Alpha	1985	<i>Bob O'Donnell</i>
• Alan	Phipps	Nu	1990	<i>Alan Phipps</i>
Evan	Pressman	Pi Tau	1984	<i>Evan Pressman</i>
CR	Roberts	Phi Lambda	1970	<i>CR Roberts</i>
Jay	Rothberg	Delta Chi	1969	<i>Jay Rothberg</i>
Dylan	Thomas	Sigma Zeta	2004	<i>Dylan Thomas</i>
ANDREW	NUNEZ	IOTA ALPHA	1994	<i>Andrew Nunez</i>

# Financial Statements

Zeta Psi Educational Foundation continues to use its resources wisely to help meet its mission through effective programs and direct financial support. The Foundation carries a long tradition of outstanding financial stewardship which continues to the present.

## COMPARED TO OUR PEERS

The Foundation benchmarks itself against other “Fraternity” Educational Foundations using publicly reported data on the IRS Form 990.

**Net Assets** – Over the past 15 years, Zeta Psi’s net assets have grown 193%. The most recent results show that our net assets are near the middle of the results for the 54 Foundations analyzed. Our net assets are within 1% of the mean and about one-third higher than the reported median. As a fraternity with fewer chapters, we are pleased with our long-term performance and growth in net assets.

**Programming** – Zeta Psi has continued to grow the total dollars and percentage of revenues used to support our programs. We intend to continue to increase dollars used to support our programs in the coming years as our endowment grows and we identify new donors to add to our ability to deliver insightful and needed programs to enrich the undergraduate experience.

**Fundraising Expenses** – Zeta Psi has consistently delivered efficiency in fundraising, choosing to put more into our programs, but we are being outpaced by our peers who are not afraid to invest in order to raise money. The Board intends to invest a few more dollars on the margins to entice new donors and to improve our outreach to our existing donors, all of which will have a positive impact on our undergraduates due to more resources for programs.

## FINANCIAL MANAGEMENT

The Foundation Board constantly balances between immediate program needs and long-term stability. Historically, the Foundation spent no more than 5% of the available endowment funds on programs. However, starting in 2016, the Foundation began to taper the drawdown with a plan to reach a 4% draw per annum by 2020. The Board believes that the more conservative draw makes sense in the current low interest and inflation environment.

The Board has noted the growth of designated and chapter-specific funds over time. The Board now requires a minimum of \$25,000 to initiate a designated fund. All funds are encouraged to disburse at least 4% of their values each year. In cases where that 4% disbursement is unused, those proceeds will then be released to the General Fund. The Board believes that this strikes an appropriate balance between current needs and building for the future, as it encourages chapters to grant scholarships, support the LTI program, or to request housing grants each year so that the intended recipients benefit from the generous gifts by Elder donors now and into the future.

The Board has continued to select AllianceBernstein as our investment advisor. The investment oversight committee is pleased with the services and the costs associated with our portfolio. The Board’s current asset allocation is 70% equity and 30% debt. The Board has selected Berard and Associates as its independent auditor and is pleased to report an unqualified return. Foundation members that attended the annual meeting received a copy of the audited statements. Any member that would like a copy may request it from the International Headquarters.

# Zeta Psi Educational Foundation

## Zeta Psi Educational Foundation

Condensed Financial Results (2019 - Unaudited)  
for the years ended May 31, 2019 and 2018

<b>Assets</b>	<b>2019</b>	<b>2018</b>	<b>2017</b>
Total Current Assets	\$ 28,380	\$64,888	\$ 125,726
Investments at Market Value	6,329,372	6,522,488	\$ 6,156,194
Total Property and Equipment	125,707	113,387	\$ 124,488
Other Assets			
Due from Zeta Psi Fraternity, Inc.	341,577	169,422	\$ 32,950
Pledges Receivable	261,050	366,802	\$ 734,956
Loan Receivable	10,591	17,797	\$ 21,245
Painting	5,000	5,000	\$ 5,000
Cash Surrender Value - Life Insurance	298,712	298,712	\$ 293,187
Total Other Assets	916,930	857,733	\$ 1,087,338
<b>Total Assets</b>	<b>7,400,389</b>	<b>7,558,496</b>	<b>\$ 7,493,746</b>
<b>Liabilities and Net Assets</b>	<b>2019</b>	<b>2018</b>	<b>2017</b>
Total Current Liabilities	\$ 118,373	\$14,093	\$ 28,664
Unrestricted Net Assets	4,187,396	4,572,363	\$ 4,673,285
Temporarily Restricted Net Assets	2,148,143	2,004,038	\$ 1,840,427
Permanently Restricted Net Assets	946,477	968,002	\$ 951,370
Total Net Assets	7,282,016	7,544,403	\$ 7,465,082
<b>Total Liabilities and Net Assets</b>	<b>\$ 7,400,389</b>	<b>\$7,558,496</b>	<b>\$ 7,493,746</b>
<b>Revenue</b>	<b>2019</b>	<b>2018</b>	<b>2017</b>
Net Investment Revenue (Loss)	\$ 51,605	\$491,238	\$ 579,712
Contributions			
Annual Fund	228,338	364,253	\$ 414,784
Capital Campaign Gifts	165,771	158,819	\$ 28,251
Net Capital Campaign activity	126,588	(174,054)	\$ (47,011)
Total Contributions	520,697	349,018	\$ 396,024
Other Revenues	19,809	17,941	\$ 18,192
<b>Total Revenue</b>	<b>\$ 592,111</b>	<b>\$858,197</b>	<b>\$ 993,928</b>
<b>Expenses</b>	<b>2019</b>	<b>2018</b>	<b>2017</b>
Program Services	\$ 537,114	\$537,429	\$ 482,855
Management and General	197,743	151,952	\$ 148,828
Fundraising	119,641	89,494	\$ 90,456
<b>Total Expenses</b>	<b>\$ 854,498</b>	<b>\$778,875</b>	<b>\$ 771,789</b>
Change in Net Assets	(262,387)	79,321	\$ 271,793
Net Assets Beginning of Fiscal Year	7,544,403	7,465,082	\$ 7,193,292
<b>Net Assets End of Fiscal Year</b>	<b>\$ 7,282,016</b>	<b>\$7,544,403</b>	<b>\$ 7,485,081</b>

# CUMULATIVE GIVING CLUB FOOTNOTES

Zeta Psi Thanks Our  
Valued Donors for  
Supporting our Programs

## Founder's Circle

\$100,000

## Order of the Escutcheon

\$50,000

## 1847 Society

\$25,000

## Order of the Five Pointed Star

\$10,000

## Phi Alpha's Council

\$5,000

## Golden Circle

\$2,500

## Silver Circle

\$1,000

## Comstock Associates

\$500

## Red Motley Leadership Club

\$250

## Century Club

\$100

**Z4L** indicates those brothers who  
are Zete4Life members.

Bolded names indicate members  
of The Zeta Psi Heritage Society

## Donations received

June 1, 2018 to May 31, 2019



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*The Red Motley Leadership Club*

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*The Phi Alpha's Council*

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Nicholas B. Jalowski '77

Frank M. McLaughlin '59

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Austin F. Carson '09 Z4L

### **Beta Tau (Tulane)**

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Raymond G. Pounds '72	John J. Wall '81	Adam J. Fechter '91	Richard B. Elliott '58
Peter C. Newell '55	Kingston McKee '53	<b>George J. D'Angelo '78</b>	Mark J. Anderson '74
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<b>Ripley H. Hunter '80</b>	Edward L. Culin '50	Andrew M. Frisvold '06	Michael Schonenberg '81
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Joseph G. Gorman '61	Warren D. Cutting '50	<b>The Phi Alpha's Council</b>	Jason Conley '98 Z4L
<i>The Silver Circle</i>	Timothy A. Devine '57	<b>Andrew C. O'Brien '02 Z4L</b>	Donald B. Leonard '60
William W. Haines '59	<i>The Comstock Associates</i>	<b>David W. Lyons '80</b>	Glen F. Ulmer '72
Drew L. Robarts '60	Curt L. Brohard '74	<b>John A. Brady '85</b>	Harrison J. Smith '71 Z4L
Ronald K. Witter '53		<i>The Golden Circle</i>	<i>The Silver Circle</i>
Terence J. Healey '86		<b>Christopher R. Hutter '89</b>	Dudley B. Panichot '51
<i>The Comstock Associates</i>		David B. Fletcher '86	<b>Sims McGrath '10 Z4L</b>
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<i>The Century Club</i>	Ryan M. Spotowski '09 Z4L	Andrew S. Bridge '78 Z4L	<i>The Comstock Associates</i>
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Alex Morolez '97 Z4L		Dan Duggen '08 Z4L	
<b>Robert J. Edgmon '88</b>		<b>Jason Huy Linh Nguyen '09 Z4L</b>	
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<i>The Order of the Five Pointed Star</i>		John J. Sullivan '84	
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<i>The Phi Alpha's Council</i>		David H. Jaynes '85	
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<i>The Golden Circle</i>		Keith A. Latham '86	
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<i>The Silver Circle</i>		Antonio A. Losada '16	
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<i>The Comstock Associates</i>		<b>Eric D. Roth '01</b>	
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<i>The Red Motley Leadership Club</i>		Daniel Rosas '09	
Gary M. Fradkin '71		Patrick Collins '86	
<i>The Century Club</i>		Steven A. Connelly '85	
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<i>The Phi Alpha's Council</i>		Ryan A. Gundrum '10	
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<i>The Golden Circle</i>		Bertinus P. Johnson '15	
Jeffrey S. Hersch '87		Amit Juneja '05	
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\$100,000

## Order of the Escutcheon

\$50,000

## 1847 Society

\$25,000

## Order of the Five Pointed Star

\$10,000

## Phi Alpha's Council

\$5,000

## Golden Circle

\$2,500

## Silver Circle

\$1,000

## Comstock Associates

\$500

## Red Motley Leadership Club

\$250

## Century Club

\$100

**Z4L** indicates those brothers who  
are Zete4Life members.

Bolded names indicate members  
of The Zeta Psi Heritage Society

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June 1, 2018 to May 31, 2019

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William Evangelakos '16

Gary A. Loch '77

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**Evan J. Doyle '13**

Quinn P. Perry '14 **Z4L**

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Allen C. Clermont '85

Peter Q. Langfield '84

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Burke J. Ryder '02

Peter C. Tuma '13

*Donors*

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Alex C. Reeves '13

Matthew D. Giambrone '15

Peter B. Yee '83

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grows great  
when old men  
plant trees  
whose shade  
they know  
they shall  
never sit in.**

– Greek Proverb



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There are many ways to make a planned gift to Zeta Psi in the United States, in Canada, and overseas. If you have already made plans to support Zeta Psi in your will, or if you would like more information on how to make a planned gift, please contact Barth Gillan ([gillan@zetapsi.org](mailto:gillan@zetapsi.org) or (845) 735-1847 x317).

### **Save The Date - Heritage Society Reception**

Friday, August 14, 2020  
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