

*the laurel hall campaign — a firm foundation for the future*



*the*

SHIELD

*of phi kappa psi*

FALL 2005

the  
**SHIELD**  
of phi kappa psi

Volume 126 Number 3  
Fall 2005

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## letter from the president

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Dear Brothers:

Truly momentous events do not occur very often within the Fraternity—at least not ones that are identifiably important as they happen. Course-changing events, whether boon or bane, are usually hidden in history to be discovered at a much later date.

The Endowment Fund and Fraternity's new home at Laurel Hall in Indianapolis, is something that, many years from now, will be just as much a part of Phi Kappa Psi as our Founders, our chapters and the many other icons that make up the fabric of our Brotherhood. It is so exciting to be a part of this historic event, and I am certain that this acquisition will be appreciated more and more in the future.

Executive Director Shawn Collinsworth said it best during one of our many meetings regarding our new Headquarters: "If I could hire an architect and have him design a building [for our new home]...this would be it."

Laurel Hall is one of the finest historic buildings in the Midwest. To make it ours is an amazing opportunity. Built in 1916 as a private residence for the Stoughton Fletcher family, it represents in its design some of the principles of Phi Kappa Psi.

As opposed to the garish American castles built by early 20th-century tycoons, Laurel Hall is a stylish English Jacobean manor house and stands as a tribute to moderation. The qualities of craftsmanship and delicate design were never spared, but there also is balance to the property in a way that makes it much more attractive.

Our organization is much the same way: A Gentlemen's Fraternity. We are men of integrity, honesty and generosity who enjoy life. No theatrics, no embellishments or overstatements as to who we are and what we stand for. In two words, true men.

The future will reveal how valuable Laurel Hall will become. I see it as a home for all that we represent and a chance to teach the younger generations what it means to be a father, husband, brother and mentor. Use it well, brothers, for it is our new home.

Welcome to Laurel Hall!

I am proud to be a Phi Psi,

James R. Blazer II  
59th President  
Phi Kappa Psi Fraternity

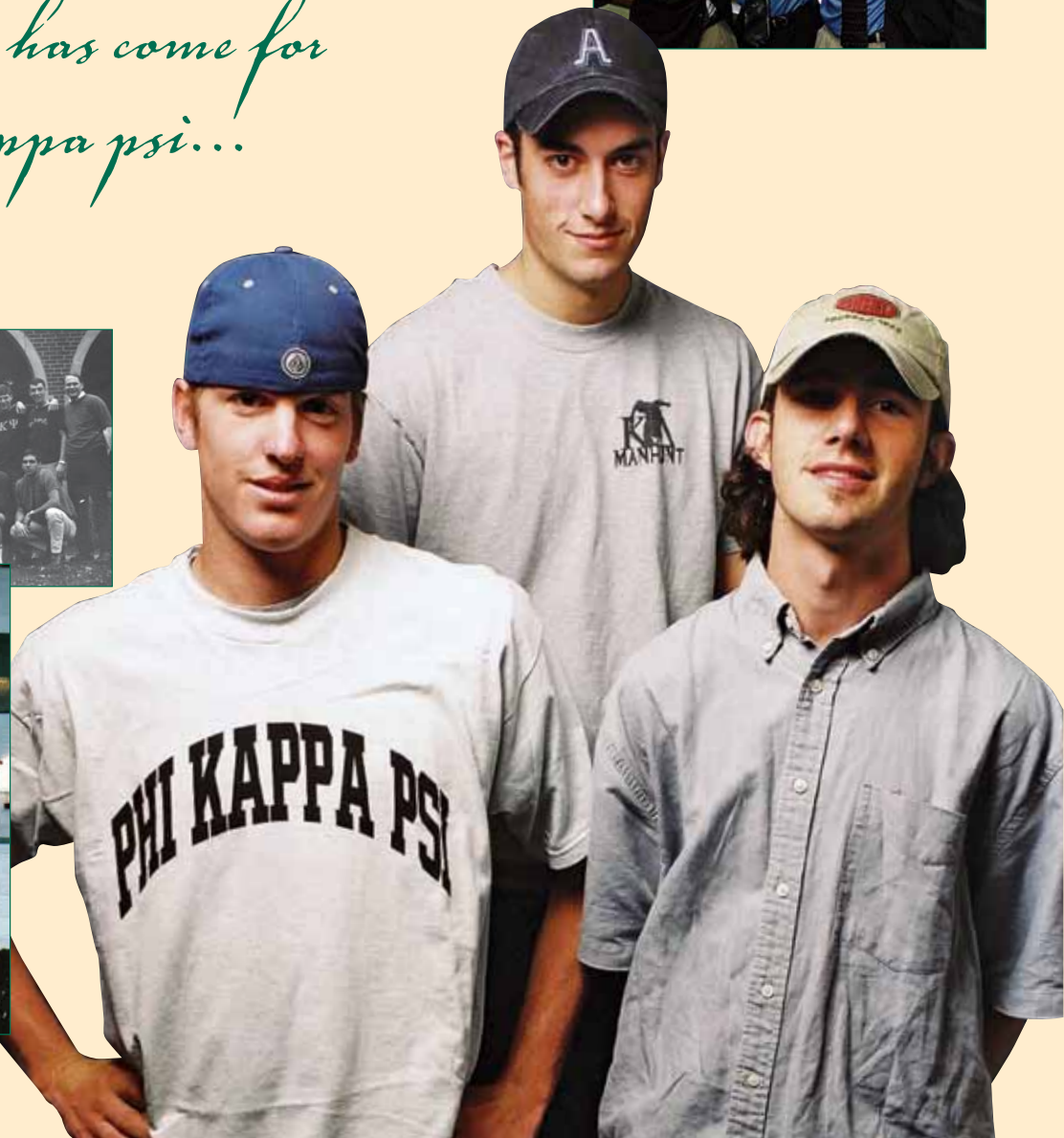
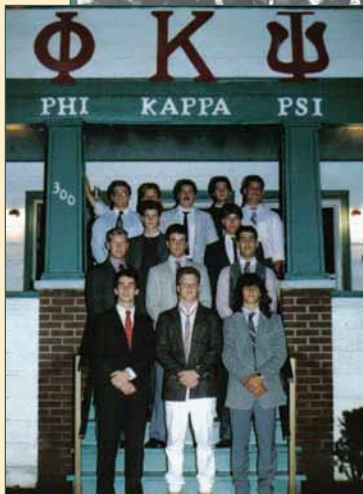


# *a firm foundation for the future*

In the life of every great organization, there comes a time when an exceptional opportunity surfaces... the kind of opportunity that can propel it to a new level of visibility, performance and professionalism... the kind of opportunity that is a catalyst for a new vision of how the organization can make an impact on its members and the world.



*that time has come for  
phi kappa psi...*



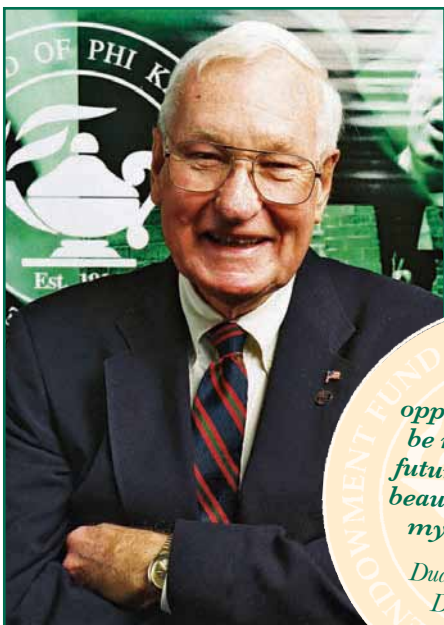
# *a firm foundation for the future – the history*

At the June 1930 meeting in White Sulphur Springs, West Virginia, the Grand Arch Council established a central office for the discharge of the Fraternity's business and appointed C.F. "Dab" Williams, *Illinois '06*, as permanent secretary and Editor of *The Shield*. Shortly after that decision, Dab opened an office in Cleveland, Ohio, at 1940 East Sixth Street - the home to Phi Psi Headquarters for 49 years. Nearly all early Phi Psi practice, policy and interfraternal prominence can be traced through the Cleveland office. It became apparent over time that the Headquarters staff would outgrow this space, and sentiment grew for the need of a new permanent home.



*A view of the Cleveland skyline.*

In December 1969, the National Headquarters Building Committee submitted a report to the Executive Council about the relocation of the Fraternity's Headquarters. By the mid-1970s, the need for new office space required the Executive Council to act, which they did on June 29, 1975, in Kansas City. The motion appointed a committee to consider Denver, Cleveland, Indianapolis and Kansas City as possible locations for the Fraternity's national office. In early September 1976, Executive Director Ralph "Dud" Daniel reported to the Executive Board on a building in historic Lockerbie Square, Indianapolis, adjacent to the home of James Whitcomb Riley, *DePauw 1883*, poet laureate of Indiana. At the Executive Council meeting on October 16, 1976, the Executive Board voted to approve the request of the Executive Director to relocate the Fraternity's Headquarters to Indianapolis.

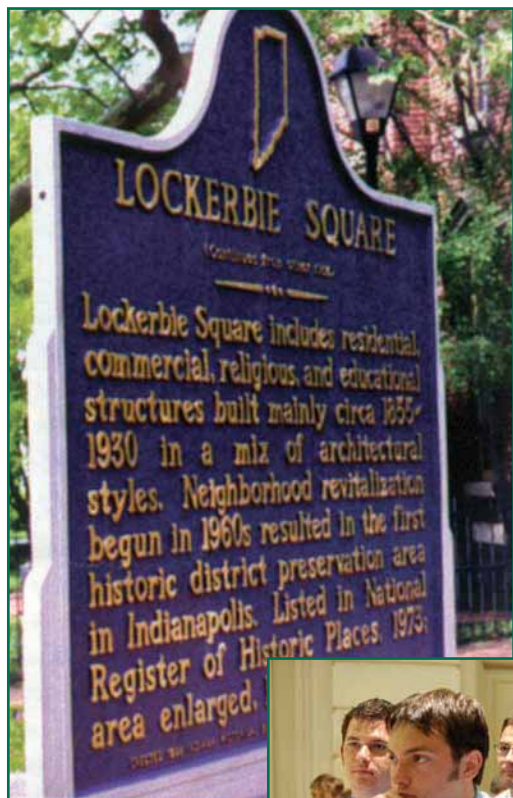


*"This is an opportunity for us to be ready for a great future. Laurel Hall is beautiful. It is beyond my expectations."*

*Dud Daniel, Executive Director Emeritus*

In many ways, Indianapolis could be seen as an obvious choice for the Fraternity. Due to the strong presence of Masonic and fraternal organizations, Indianapolis afforded no property tax on fraternities, a benefit that has brought numerous fraternities to the Circle City. Phi Kappa Psi geography also proved to be a reason for selecting Indianapolis, as it is close to the organization's hearth of Pennsylvania, Ohio and Indiana, yet still was a move west





and south from Cleveland in accordance with the spread of chapters to new regions.

Phi Kappa Psi bucked the conventional trend of fraternal groups by choosing a unique location. While most fraternities moved to the north side of the town, to be a part of “Founders Row,” Phi Kappa Psi looked downtown and joined the historic Lockerbie Square neighborhood. The property at 331-333 East Street came into Phi Kappa Psi ownership on February 1, 1977, for the price of \$49,000. After the purchase was settled, the building, now known as Heritage Hall, had to be completely restored. The outside was partially restored by the Historic Landmarks Foundation of Indiana,



and thanks to the solid original brickwork, the building was structurally sound. The remainder of the exterior and whole interior needed a complete overhaul.



*June 1, 2003 marked the 25th Anniversary of Heritage Hall.*

In the end, Heritage Hall became a headquarters as well as a functioning Victorian museum.

All of the light fixtures are period pieces that have been wired, although the original intention was to have the house lit with gas. Nearly all of the furniture in the building is Victorian as well, although one of the desks is even older, from the Napoleonic era. Each room in Heritage Hall has its own distinctive look, offering something for both the historian and Fraternity member. Throughout the building, intermingled with the museum, are the offices and workspaces of the employees, and living quarters for the four traveling Educational Leadership Consultants. On June 1, 1978, Heritage Hall officially opened its doors as Headquarters of Phi Kappa Psi.



# *a firm foundation for the future – the need*

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For over a year, the Foundation and Fraternity have been discussing the need to move to larger quarters. Heritage Hall has served our needs for 26 years, since our move from a downtown Cleveland, Ohio office building, but simply does not have the event space, work space or parking for any expansion. In addition, real estate in the mostly residential Lockerbie community where Heritage Hall is located is at a premium, many times the value of just a decade ago, making it difficult to acquire adjacent property to grow.

The building that would best meet our needs would have significantly more space than the 7,000 square feet we have now. There must be area for educational programming, special events and celebrations, museum and archive space, space for board meetings and parking to accommodate staff and visitors. There also must be ample space to recognize our leaders and donors from across the generations and to memorialize our most accomplished and loyal members.





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The Fraternity staff has almost doubled in the last ten years and the Foundation now has its own staff. A new building must provide the administrative and support area for twenty or more and should include the latest in technology, as well as support for online education and training. And, of course, there should be ample room for storage and warehousing – something we pay to do off-site today.

Finally, the building should be of historical construction to reaffirm the long history of the Fraternity; of firm foundation to symbolize our longevity and strength; on a suitable piece of land, high on a hill, to convey our lofty ideals and our connection to higher education and, finally, the building should be a focal point of activity, tied to the community and a showplace to which members and friends from across the nation are welcomed.

*we have just the thing!*





# *a firm foundation for the future – the solution*

Laurel Hall, built in 1916 for the Stoughton Fletcher family, is an historic icon in Indianapolis and the Midwest. The impressive Jacobean Revival manor sits high on six wooded acres bordering Fall Creek and provides over 30,000 square feet of usable space. It has served as a girl's school, a private club and, for the last twenty years, the home of the Hudson Institute, a public policy think-tank. Its new owner is the Endowment Fund of Phi Kappa Psi.

The Hudson Institute's decision to move operations to Washington, D.C. provided us an opportunity to purchase the building at an exceptional price – less than its original \$2 million construction price almost 90 years ago! This exceptional price, combined with our ability to sell Heritage Hall at the height of market pricing, made this purchase an easy decision.



*The view from the Fletcher's loggia.*

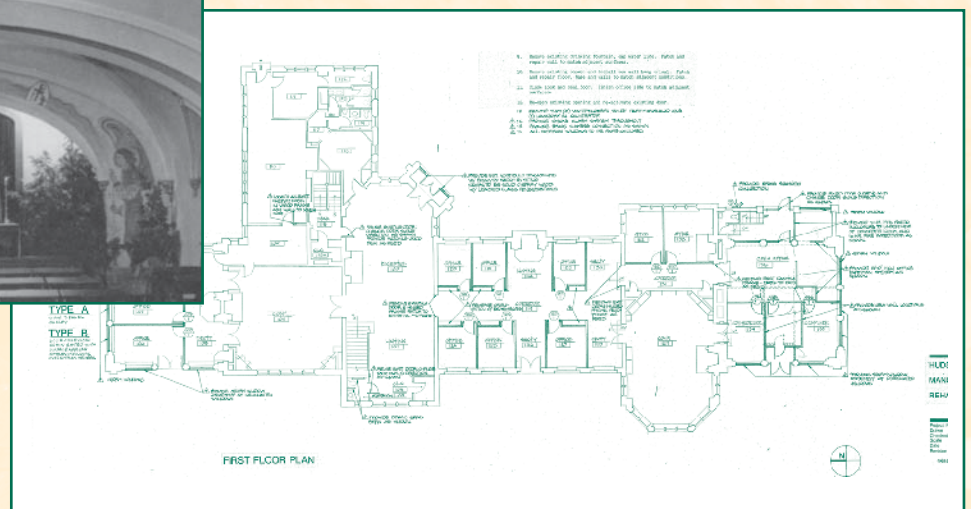
For many years, Laurel Hall has played an important role in the Indianapolis community, hosting community groups and charity events, weddings, fundraisers and special celebrations. There is a long history of supporting other area non-profits and we welcome the chance to continue that legacy.

Further, the building gives us all the room we need to grow, so that we may expand programs and services to our chapters and members. When we moved to Indianapolis from Cleveland, we had a staff of three. Now we have a staff approaching twenty. As the needs of our members change, we have the space to change the size of our staffing without straining our resources.



*The Ladywood Chapel.*

*The Hudson Institute 1st floor plan.*





# *the history of laurel hall*

## Phi Psi's New Headquarters an Indiana Landmark

*With research and portions from The Herman Kahn Center of the Hudson Institute by Kate Lenkowsky*

Phi Psi has a nice habit of choosing structures with remarkable historic value as Headquarters sites. Heritage Hall neighbored James Whitcomb Riley's home, now a museum, in the pristine Lockerbie Historic District that had previously been rundown and blighted. Our new home is every bit as significant.

Laurel Hall is now Phi Kappa Psi's Headquarters, but while it is new to us, it has been part of Indiana's historical landscape for nearly 90 years. During that time, it has played host to an all-girls school, a non-partisan think tank, and, in the beginning, the opulent home to one of Indiana's wealthiest, most eccentric and tragic families, the Fletchers.

### *the rise and fall of the fletcher family*

Calvin Fletcher brought the family name to Indiana in 1821. According to Kate Lenkowsky, author of *The Herman Kahn Center of the Hudson Institute*, a monograph published by the previous



owners of Laurel Hall. Calvin was the only lawyer in Indianapolis, and eventually rose to power as a state legislator. At the request

of Governor Noah Noble, Fletcher established the first State Bank of Indiana, serving on its first board of directors along with several distinguished Hoosiers, as described in Donald Carmony's *Indiana*,

*1816 to 1850: The Pioneer Era*. According to Lenkowsky, Calvin Fletcher's brother, Stoughton A. Fletcher, would create S.A. Fletcher and Co., a "small private bank" in 1839.

This little bank would grow along with the city of Indianapolis. Stoughton A.'s son, Stoughton J. Fletcher, would take the reins in 1882 following his father's death and built "Fletcher's Bank" into a national bank in 1900. Unfortunately, as noted by Lenkowsky, Stoughton J.'s health failed, and he passed the bank to his son, Stoughton A. Fletcher. By 1920, the Fletcher American National Bank had gone through a merger and was the largest national bank in Indiana, which gave Fletcher the financial wherewithal to build Laurel Hall, named for his mother, in 1916 at the cost of \$2,000,000. The mansion was built upon 1500 acres of farmland and woods.

Lenkowsky's research makes it clear that Fletcher's opulent family home showcased his personal taste for the extravagant. Undoubtedly it led to a great deal of gossip, some of it far-fetched. With his hobby of horse breeding ("...a mating party was held on the lawn for Peter the Great [a famous trotting sire]...") and reportedly using "a cement mixer to make martinis," Fletcher had a wide reputation beyond the banking world, which contrasted with the staid legacy of his father and grandfather.

The first tragedy to strike the Fletcher family was a result of World War I. The government



*The Grand Lobby.*



*The stately exterior.*



needed turbine engines, to which Fletcher responded with his own assets. Lenkowsky notes that Fletcher expected to turn a profit from his consolidation of two companies to facilitate the expedient production of the engines, but the end of the war halted the need for his product. With his personal fortune in peril, Fletcher gave up his controlling interest in the Fletcher American National Bank in 1921.

Personal tragedy also struck the Fletchers that year. Stoughton's wife, May, had been afflicted with stomach problems and "nervous trouble." After a trip to New York brought no relief, she took her own life by ingesting Prussian Acid, a poison. Her mother, Mrs. Eva Henley, found her daughter's body and, in a fit of despair, drank the remaining acid and died minutes later. Stoughton was in Chicago on business, and immediately returned to Indianapolis. This tragedy was the banner headline of the Indianapolis News on March 23, 1921, a sad reminder of the enormous influence of the Fletchers on Indianapolis life.

By 1923, the Fletcher fortune had been decimated. Stoughton resigned as President of the Fletcher American National Bank and relinquished all ties to the bank. One year later, he declared bankruptcy, with assets of \$481.39 to his name, while owing \$1,763,602.54. The Fletcher American National Bank took ownership of Laurel Hall, selling it in 1925 to the Sisters of Providence, who opened Ladywood, a Catholic, all-girls boarding school.

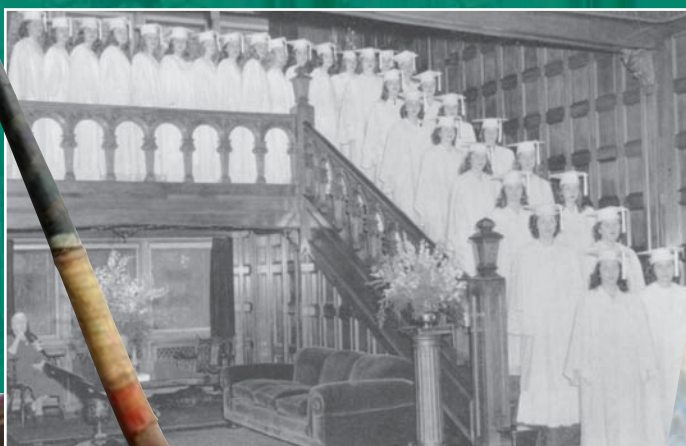
Fate had not finished the tragic arc of this once-proud family. In 1941, Stoughton's son, Stoughton "Bruz" Fletcher, committed suicide in Hollywood. His obituary noted that he was a well-liked though mysterious man, a singer in a nightclub and author of two books, *Beginning with Laughter* and *Only the Rich*. The only other child of Stoughton A. Fletcher, Louisa, may have committed suicide as well, though sources are unclear on the exact cause of her death. The man who built and lost Laurel Hall along with a banking fortune, Stoughton A. Fletcher, died of natural causes in 1957.

### *a preparatory institution*

The Sisters of Providence purchased Laurel Hall, along with "...the garage and power house, a large greenhouse with three wings, five stucco houses, five cottages, a laundry and more than 220 acres of surrounding land," for \$600,000, as reported in the Nov. 7, 1925 edition of the Indianapolis News, again as the banner headline. A number of new buildings were planned to create one of the most impressive preparatory schools in the nation.



1945 Ladywood Graduation Program, Lady-Lore Yearbook, and class ring



Ladywood graduating Class of 1947, 1944 Field Day Program and a student's field hockey stick.





During the early years of Ladywood, girls lived and were educated within Laurel Hall. Lenkowsky notes that the Ladywood diploma was very well-regarded, attracting the daughters of some of America's most wealthy families, including the daughter of Indianapolis Motor Speedway owner Tony Hulman and Antoinette Giancana, who "found her education cut short when it became known that her father, Sam, had connections with organized crime in Chicago."

The post-World War II population boom sparked a need for larger schools across the nation. In 1963, a new building was opened, increasing Ladywood's total capacity to 600 students, according to Lenkowsky. Unfortunately for the Sisters of Providence, this investment would prove to quicken Ladywood's downfall, as that capacity was not filled. Lenkowsky writes that a 1970 merger with St. Agnes School, another Sisters of Providence school in the Indianapolis area, could not save the project, and Laurel Hall was sold to local businessman Robert V. Welch in 1974.

### *housing development and the hudson institute*

Welch developed a community, Windridge Condominiums, around Laurel Hall, with the "Manor House" playing the role of office and entertainment center. He also sold 34 acres of land to Cathedral High School, which was an all-boys school at the time but opened its doors to women after acquiring the former Ladywood-St. Agnes property. Welch's housing development included extensive remodeling of Laurel Hall, including a "private dining club on the first floor, and a swimming pool" on the grounds, but, according to Lenkowsky, the 20-percent interest rate in the housing market at the time made Welch's debt unserviceable. He offered to sell Laurel Hall to the residents of Windridge Condominiums, who declined, and in 1982 Laurel Hall was once again taken over by the bank.

The most recent owner of Laurel Hall and the surrounding property was the Hudson Institute, which is a "non-partisan policy research organization dedicated to innovative research and analysis that promotes global security, prosperity and freedom," according to their website. The Hudson Institute was founded by Herman Kahn, Max Singer and Oscar Ruebhausen in 1961 in Croton-on-Hudson, N.Y. Following Kahn's death, the institute moved its headquarters to Laurel Hall in 1984, naming the building the Herman Kahn Center after its late founder.

The Hudson Institute kept Laurel Hall as its national headquarters until June 1, 2004, when it moved central operations to Washington, D.C. so it could be closer to the political arena that it critiques. While most of its staff moved to Washington soon after the official move, several stayed behind to care for the institute's records until Phi Kappa Psi purchased the building and property in 2005. As Lenkowsky notes, the Hudson Institute's purchase of Laurel Hall fit well with the organization's purpose and space needs, but also made the think-tank "part of Indianapolis history." Phi Kappa Psi has already made a mark on the history of this city in the Lockerbie District, and our purchase of Laurel Hall will serve to continue the deep bond that we and many other Greek organizations share with Indianapolis.



*"Moving to Laurel Hall is a good idea because it once again consolidates the offices of the Endowment Fund and the Headquarters staff. Laurel Hall also provides Phi Kappa Psi with a computerized conference space to begin holding events like PLA and FELA at our Headquarters. Additionally, Laurel Hall provides Phi Kappa Psi with the necessary space for the future expansion of the Headquarters and Endowment Fund staff."*

*Bryce Myers,  
District II Archon*

# a firm foundation for the future – the purchase

It really is quite an amazing story. Perhaps no other fraternity could have pulled it off. The end result was a new home and Headquarters for Phi Kappa Psi in only 48 hours!

The Fraternity and Foundation have been talking for almost two years about the need for more space. In fact, a committee was created to evaluate the organizations' needs and determine the best course of action. The committee held its first meeting only a few weeks before Robert Marchesani, *Butler '94 (Indiana University of Pennsylvania '79)* ran across an article in the Indianapolis Star newspaper on February 8th.

The article discussed the move of Hudson Institute, a public policy think tank originally from New York, from the former Stoughton Fletcher mansion in Indianapolis to offices in Washington, D.C. That left the 30,000 square foot Fletcher mansion empty and the community was interested in who might be the next owner of this Indianapolis treasure.



February 8

9:45 AM

Bob Marchesani knows Phi Psi is discussing options for a new Headquarters and sends an email with a link to the online Indianapolis Star article to Executive Director Shawn Collinsworth.

10:25 AM

Collinsworth sends the article to the Headquarters Planning Committee Chair Paul Oblon and a copy to Fraternity President James Blazer.

11:45 AM

Blazer, who was on the phone with Endowment Fund Trustee Jerry Nelson, forwards the article to Nelson and within five minutes, Blazer receives a response – “Buy it!!” That’s when the wheels really start turning...

By Noon

Jim Blazer contacts Shawn Collinsworth and Fraternity Treasurer Stu Rhodes, both in Indianapolis, informing them of the plan and letting them know he is leaving for Indianapolis and will be there in four hours. They arrange rooms for Jim and Jerry Nelson at the Columbia Club downtown. Jim contacts the listing agents and arranges for a meeting to tour the property the next morning.

Meanwhile, Jerry Nelson is trying to figure out how he’s going to get to Indianapolis by that evening from his home in Cabo San Lucas, Mexico. A quick call to Brother Scott Noble and has Noble’s private plane fueled and on its way to Los Cabos to pick up Jerry and fly him to Indianapolis.

By that time, Endowment Fund Director Tom Pennington is already in the air, leaving Los Cabos after a weekend retreat of directors from over twenty men’s and women’s fraternity foundations. When he arrives in Houston for his connecting flight to Indianapolis, Tom gets Jerry and Jim Blazer’s messages on his cell and knows to meet them at the Columbia Club upon arrival.

Jerry gets to Indianapolis ten minutes before Tom, though he leaves Los Cabos three hours later (ahh, the pleasures of private flight!). Both go to the Columbia Club where they strategize about the next day’s meeting. What they all don’t know is that Jerry’s made a few calls en route...



Ruth Lilly, granddaughter of Eli Lilly, the founder of the pharmaceutical empire, recently had made a significant gift to Hudson to renovate portions of the Fletcher mansion and build a new conference center. Would the new owner keep the center and continue to make it available occasionally to community groups? If not, would Hudson have to repay the grant?

Current Governor Mitch Daniels was CEO of the Hudson Institute when it purchased the mansion in 1987. His office hoped another non-profit organization would inhabit the building and that any new owner would be committed to restoring and maintaining the property as an important Indiana landmark. There was even talk about whether or not the building might make a good Governor's Mansion.

Though the mansion was on its own six acres, it was inside a gated community. The association members couldn't dictate who could buy the mansion, but they certainly did not want a large commercial enterprise with the traffic and noise a hotel or private club might generate. The table was set and Phi Psi is the perfect fit.

*February 9*

10:00 AM

Everyone meets at the Fletcher mansion to do a walk through. The building is magnificent – majestic – everything that any first class organization would want. It needs plaster, paint, some roof work, etc., but the foundation is solid and the detail of exotic woods, carved limestone and vintage craftsmanship is simply beyond description.

11:45 AM

After a thorough tour, the group heads over to the new Delta Tau Delta Fraternity Headquarters – the newest and most impressive of those in Indianapolis. The tour is useful in helping to focus on how Phi Psi might modify and use the Fletcher mansion, if purchased.

12:30 AM

At lunch, Jerry Nelson shares that he has the commitment of at least four other trustees - Don Fites, Bruce McMahan, Scott Noble and Denny Schwartz – for gifts of \$200,000 each toward the purchase of the building. With Jerry's commitment, that makes an even \$1 million. The group breaks from lunch with the knowledge that they are nearly halfway to the goal of the \$2.25 million asking price.



2:00 PM

Jerry Nelson, Jim Blazer and Tom Pennington meet with the realtors to make an offer. Jerry negotiates like a master and, after some time, offers \$1.6 million. The agent calls Hudson to relay the offer and they counter with \$1.7 million. Jerry agrees to \$1.65 million, but only if all the furnishings are included. Hudson accepts and they have a deal!

Over the next few weeks, a full due diligence inspection of the property was done by architects, engineers and environmental specialists. All were amazed at what great shape the building was in.

The purchase papers were drawn up and signatures all gathered on Friday, May 13 – a lucky day for Phi Psi. Transfer of title and ownership occurred officially on Wednesday, May 18 – fittingly, Brother Nelson's birthday.

## *cornerstone donors* - the “go-to” guys

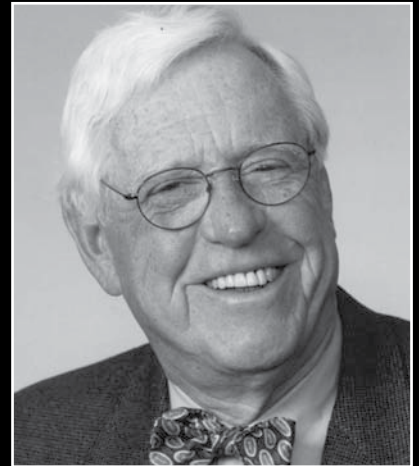
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Every fraternity has them. We couldn't exist without them. They're the die-hard, loyal and committed alumni who step in to save the day when you really need a miracle. Phi Psi has some of the best and, when it came to figuring out how we were going to come up with the funds to purchase Laurel Hall, these men stepped up without a second thought.

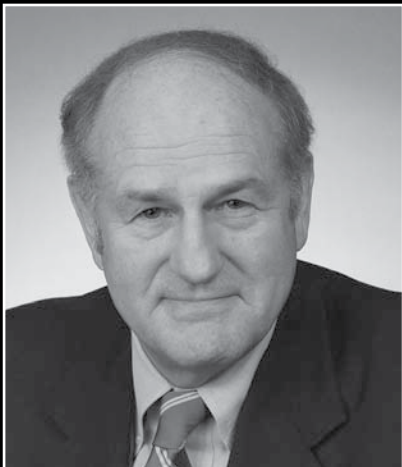
We're appointing them our Cornerstone Donors - the highest donor level in the Laurel Hall Campaign. Each made a gift of \$200,000 to raise a total of \$1.4 million in just a few weeks - the first million in only 48 hours! Each is a Fraternity treasure and has made it possible for other Laurel Hall Campaign gifts to be used for renovations, furnishings and an operating endowment.

A special plaque will be created for permanent display in Laurel Hall to dedicate the building to these men who, in essence, bought Laurel Hall for Phi Kappa Psi. And each will receive a limited edition print of the property, framed, personalized and signed by the artist. Because of their generosity, Phi Psi will have a first rate building, debt-free, to serve our needs for decades to come.

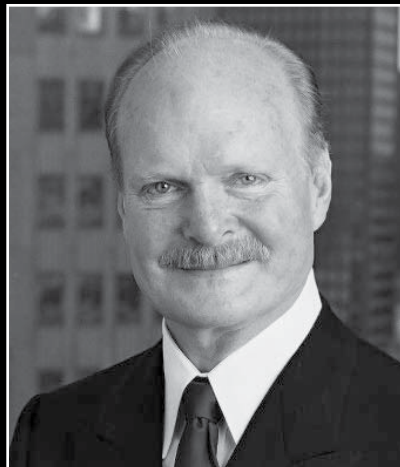
By the way, there is one more Cornerstone spot available. With an additional \$200,000 gift we will have raised a total of \$1.6 million - the price of the property, less furnishings. If you're interested in stepping up to the Cornerstone level, contact the Endowment Fund offices at (800) 350-1852.



James W. Emison, *DePauw* '49



Donald V. Fites, *Valparaiso* '53



D. Bruce McMahan, *USC* '57



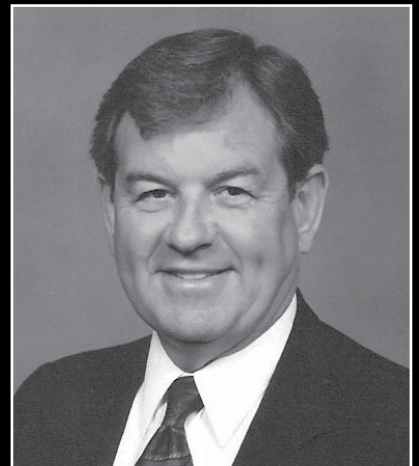
Jerry Nelson, *UCLA* '48



A. Scott Noble, *Texas* '81



J. Gilbert Reese, *Ohio State* '47



Dennis J. Schwartz, *Purdue* '60



## *a firm foundation for the future – the project*

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The project is an ambitious one, but we are well on our way. Over \$1.4 million already has been collected toward the purchase price of \$1,650,000, including the furnishings and fixtures. Moderate renovation and upgrades will need to be done to change the space for our needs, but the building is in good condition and includes some incredible spaces.

Enter the building on the first floor, into a grand lobby with rich hardwood paneling and massive fireplace. To the right are new public bathrooms and a large dining room and solarium, connected to a full commercial kitchen. To the left is the new, state-of-the-art, Ruth Lilly Conference Center, completed in 2004. Past the conference center is the Executive Board Room and library to accommodate meetings, as well as additional office and public space.

Ascend the impressive three-story central stairway to the second floor and you enter the Fraternity's executive offices and reception area – all in historic period style – and a junior board room for meetings. On the other wing are six guest suites, which will be renovated in period style, for alumni and special visitors, as well as an apartment area for our Educational Leadership Consultants.

Continue up to the third floor and step into a magnificent former ballroom and chapel. Once renovated, it could be used for initiations, ceremonies and celebrations, ringed by archive cases filled with Phi Psi memorabilia. On the other side of the staircase are Fraternity support staff offices and restrooms.

The basement is large and houses the building's mechanical equipment. Our plans are to create a large central mailroom with printing, binding and shipping area, as well as a new call center to better serve our alumni and support our fundraising program. Hidden on one end of the basement level is the old billiards room – a wood-paneled library and lounge – perfect for small meetings and more social gatherings of brothers.

And don't forget the land – almost six acres in all! The original landscapers brought trees and shrubs from all over the world. Many of these interesting plantings still thrive and make for a tasteful and unique wooded landscape. We'll improve it as part of a landscape master planning process beginning this spring.

Additional modifications, upgrades to mechanical systems, restoration and renovation will take several years. We're in no hurry, since we plan to be there for decades to come. We want to ensure that these expenses do not reduce current assets that are vital to provide scholarships and support for educational programming, so we don't intend to spend until the gifts come in.



# *a firm foundation for the future – the motivation*

Heritage Hall was completed in 1977 for a total cost of approximately \$250,000. The 7,000-square foot building has served the Fraternity well over the years, but we need more space. The Endowment Fund already had to acquire additional office space downtown to meet its growing needs.

We have almost twenty staff, but parking for only twelve vehicles. Lockerbie Street Association lobbying has changed the parking in the area and we no longer have on-street space in front of our own building, even for visitors.

Lastly, there may never be a time where the return on our investment in Lockerbie will pay off more handsomely. Prices for homes and office space in the area are at a premium, as more and more people want to live in a thriving downtown community.

Laurel Hall offers us a building for now and for the future. With over 30,000 square feet, we'll have room to grow for decades. With more than sixty parking spaces, we'll have plenty of parking. With extensive public spaces, we'll be able to host our own alumni events and also derive extra income from special events to help offset the costs of ownership.

The new Ruth Lilly Conference Center is a state-of-the-art facility that will help us deliver top-notch educational programming to our membership, as well as host other non-profit groups in Indianapolis. Benefiting from the Lilly name and support, this center will be a great resource and a symbol of our commitment to education.

Its elegant architecture and bold stature will make Laurel Hall the center of Phi Psi activity nationwide – a place to celebrate our successes, recognize our outstanding members and serve our chapters, alumni and friends. Like our present building, we will come to love and cherish this new icon of Phi Psi success and energy – a destination for members, not just a location.





# *a firm foundation for the future – the purpose*

A great organization should have a great building to stand as a statement of the impact the organization will make on the world. Phi Kappa Psi has grown to become a great national fraternity and deserves a landmark of national caliber as its base of operations.

This is your chance to be a part of a project that will change the future for Phi Kappa Psi. There are limited rooms/areas available for sponsorship. Consider then, how important this opportunity is – for Phi Psi and for you.

We've secured commitments enough for the purchase of the building. What is needed now is your sponsorship to underwrite the renovation and to provide for the endowment of operating costs to ensure the building is safe, secure and ready to serve us for years to come.

With the completion of this campaign, Phi Kappa Psi will have the most impressive facility in the Interfraternity world – without debt, improved to meet present needs, with the best of educational technology, providing enough room to grow for the future, serving as host to Fraternity and other events – and with an endowment to cover operating and maintenance budgets for years to come!

Please consider a significant gift to help improve this magnificent building – our new home, Headquarters and meeting center.

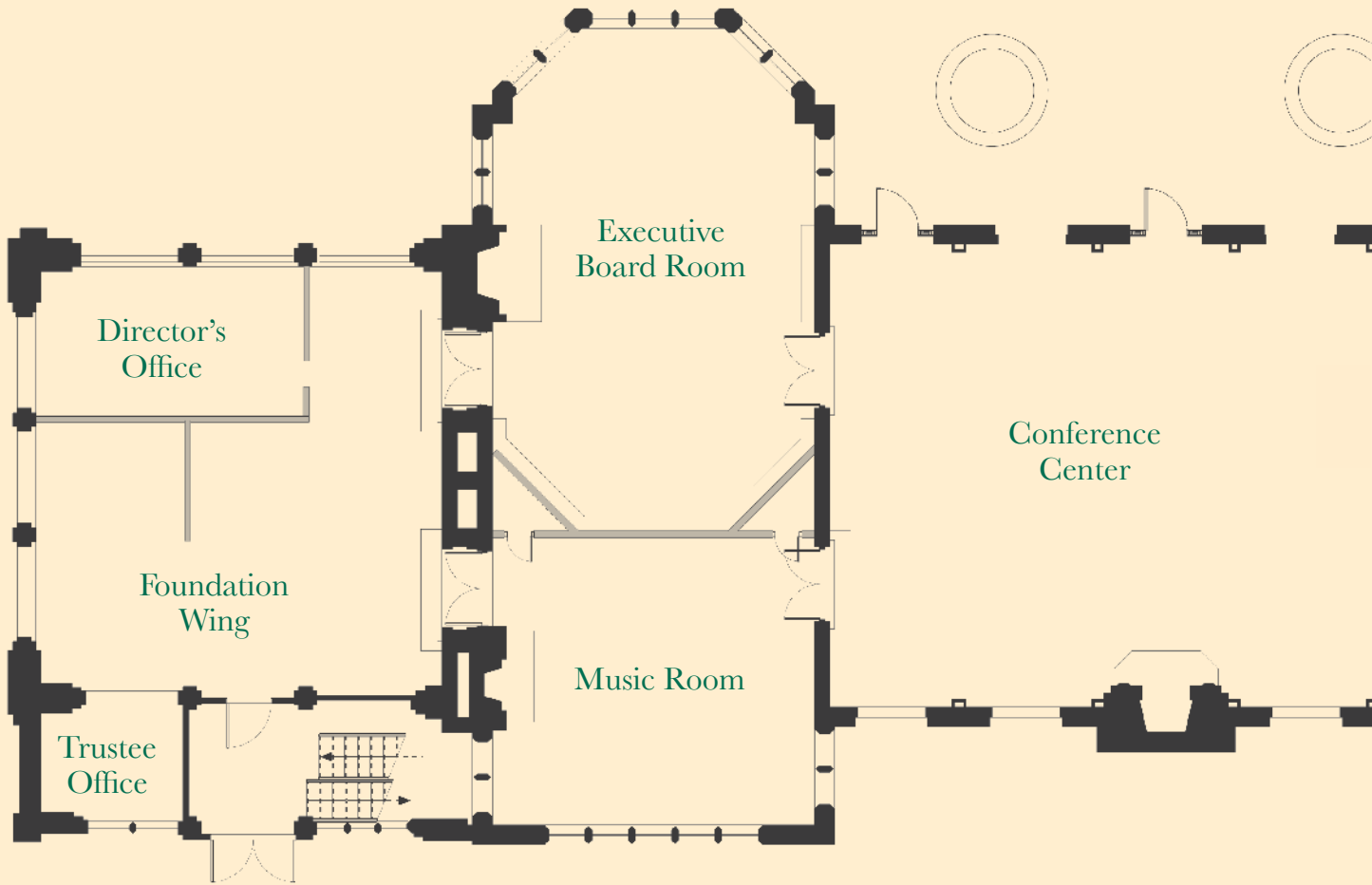


*The move to Laurel Hall will be an excellent launching pad for our marketing/branding campaign. We know that Phi Psi is a premier Fraternity with a great deal of history to its name. The move to an Indianapolis landmark with such deep history will be the convergence of two entities full of tradition.*

*Daniel Duran,  
District VI Archon*



# first floor plan



1 FIRST FLOOR  
SCALE: 1/8"=1'-0"



*One of only 100 rugs of this design produced, this rare Atiyeh patterned 14 ft. by 20 ft. rug will be placed in the grand lobby of Laurel Hall.*





# *first floor sponsorship opportunities*

## **PUBLIC ROOMS**

### **The Grand Lobby**

The Grand Lobby will be the first impression visitors to the building will have. Beautiful walnut paneling and cherry floors grace a central seating area in front of an impressive limestone fireplace. This room ushers visitors to the Lilly Conference Center, the formal dining room and solarium, and the elegant Grand Staircase. The sponsorship will allow us to treat and preserve the old wood walls and floors, update furnishings, provide new oriental rugs and restore the fireplace to working order.



### **Elevator**

Space is available, but an elevator in an historic building is quite a task. The final product must be efficient and low-maintenance, but also installed in such a way that does not compromise the structural integrity or character of the building. The sponsorship will allow for the engineering work to create the shaft, the purchase of the elevator and the electrical and construction needed to install it.

### **Executive Board Room**

The formal board room has beautiful hardwood floors and walls and ample space for Phi Psi's extensive library. Highlighted by a fifteen foot Tudor ceiling and a large bay window set with antique mouth-blown glass, the room will serve the Fraternity and Foundation for board and council meetings. The sponsorship will provide for restoration of the wood and glass, a new carpet and furnishings, a wireless internet network and video conferencing hardware. There will be few boardrooms in the city with such a combination of character and capability.



### **Dining Room**

The formal dining room will see many special events and celebrations. With mahogany-paneled walls and cabinets and a rare herringbone-patterned floor of exotic hardwoods, it is a fitting site for formal dinners. The sponsorship will underwrite restoration of all wood, improvements to lighting, restoration of the limestone fireplace and some new furnishings. Formal linen and tableware, including new china featuring the Phi Psi crest, will be added by other donors.



### **Grand Staircase**

One of the most impressive features of the building is the magnificent three-story carved walnut staircase. Anchoring the lobby and joining the formal areas on the first floor with the ballroom on the third, it is complimented with walls of leaded windows, reflecting Shakespearean and Arthurian legend. The sponsorship will allow us to restore and refinish the wood of the staircase and landings and keep them in good shape.



### **Kitchen**

Every great house needs a great kitchen. The current commercial quality kitchen was rebuilt almost 20 years ago and is in need of significant improvement. The sponsorship will allow us to repaint and renew the kitchen and serving pantry, replace deteriorated equipment, service the fire safety system and ensure compliance with all current health and safety codes.

### **Music Room**

The old music room was partitioned into two offices, currently serving the Endowment Fund until their space is ready. At that point, these walls can be removed and the area restored to its original design. It will serve as a display area for our baby grand piano and several exceptional Victorian pieces in our furniture collection, as well as a unique break-out area for our conference center and reception area for the Endowment Fund. The sponsorship will be used to remove the office walls, restore the wood floors and decorative plaster work, paint the area and add a new oriental rug.

### **Solarium**

Also a space initially partitioned into offices by an earlier tenant, we've already removed the walls to open the room back into one of the most impressive spaces in the building. Marked by a magnificent marble floor, the room is ringed on three sides by large windows, accented by limestone columns and cornice work and anchored by a large limestone fireplace on the fourth wall. The original room had a fountain and a water feature is being discussed in the renovation. The sponsorship will underwrite repairs to the marble and columns (done when the office walls were installed), new lighting and repairs to some window glass and hardware.

## **EXECUTIVE OFFICES**

### **Foundation Wing**

The Endowment Fund wing will inhabit a space adjacent to the Music Room, Lilly Conference Center and Board Room, on the first floor. Originally a tiled loggia open to the elements, the space will take advantage of three walls of glass, capped by beautiful arched windows. Brick and limestone will be cleaned and repaired and artwork and antiques from Heritage Hall will be displayed. The sponsorship will pay for the

restoration of the windows and walls, as well as a new ceiling, carpeting and paint.

### **Endowment Offices**

An office unit will accommodate the Endowment's Director and Assistant Director and provide space for an Administrative Assistant and part time accountant. The sponsorship underwrites the cost of construction, lighting and HVAC work.

### **Trustee Office**

Adjacent to the foundation area is an office niche we will use as a space for trustees or other donors needing an office for the day. We'll renew the space and furnish it with antique office pieces from our collection, but also provide wireless internet and phone to make the space functional. The sponsorship will cover the costs of restoration, wiring and moving the furniture to the new location.

## **HISTORICAL, HONOR AND MEMORIAL (INDOOR)**

### **Donor Wall of Honor**

This significant campaign will recognize its many donors with a new wall of honor, incorporating campaign contributors and our annual and cumulative club donors as a permanent display within the building. Created in such a way as to allow us to modify the wall as new donors are added and others move up to higher giving levels, the wall will be a living testament to the loyal support of alumni, undergraduates and their families and friends.

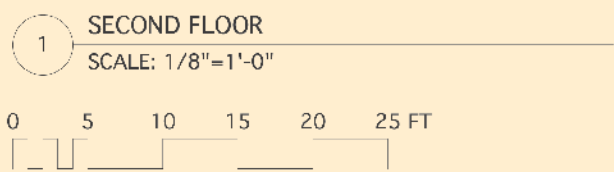
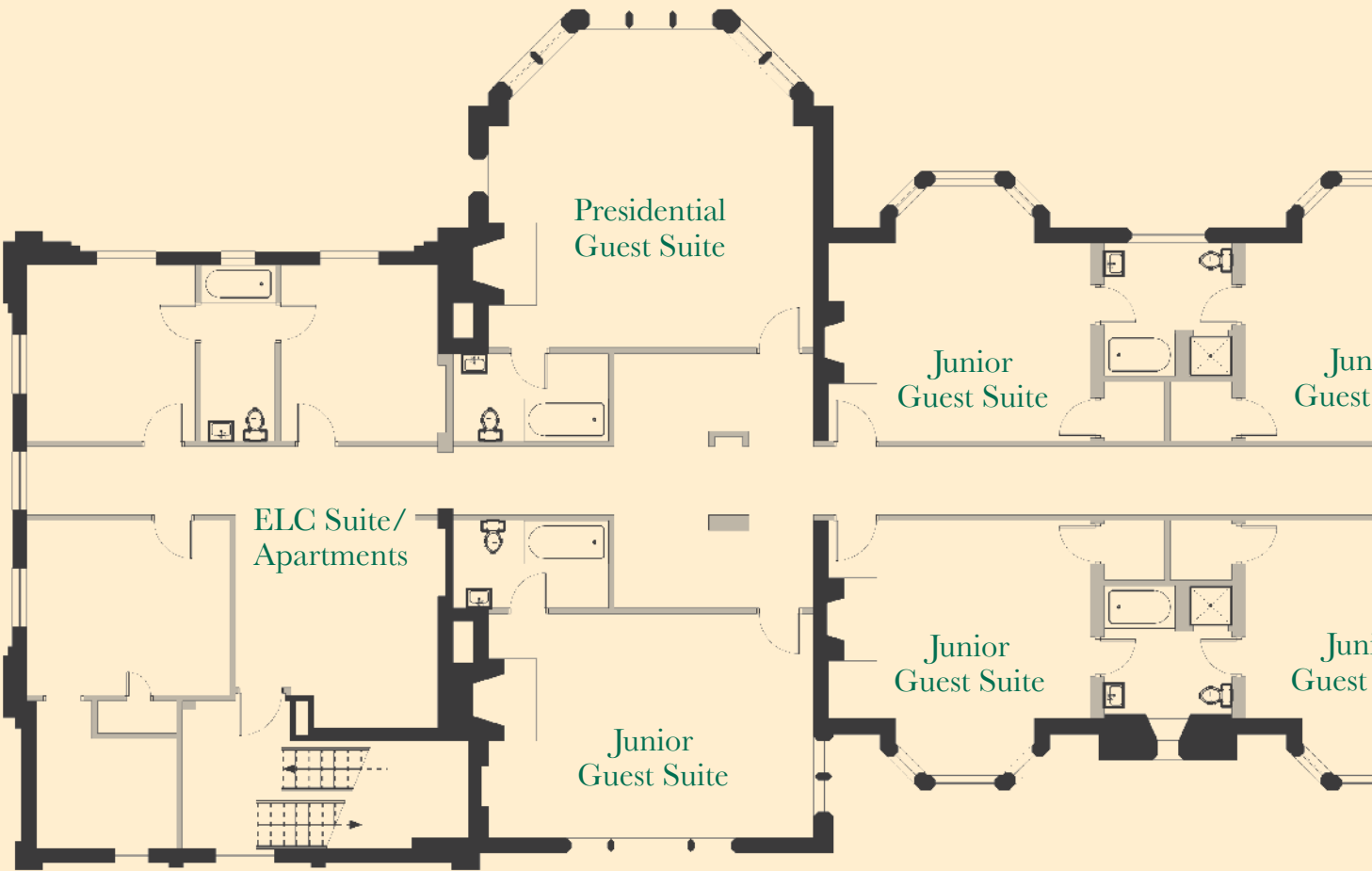
### **Veterans Memorial**

By special request, we will be installing a memorial dedicated to members who have made the ultimate sacrifice while in active service in branches of the U.S. military during wartime.

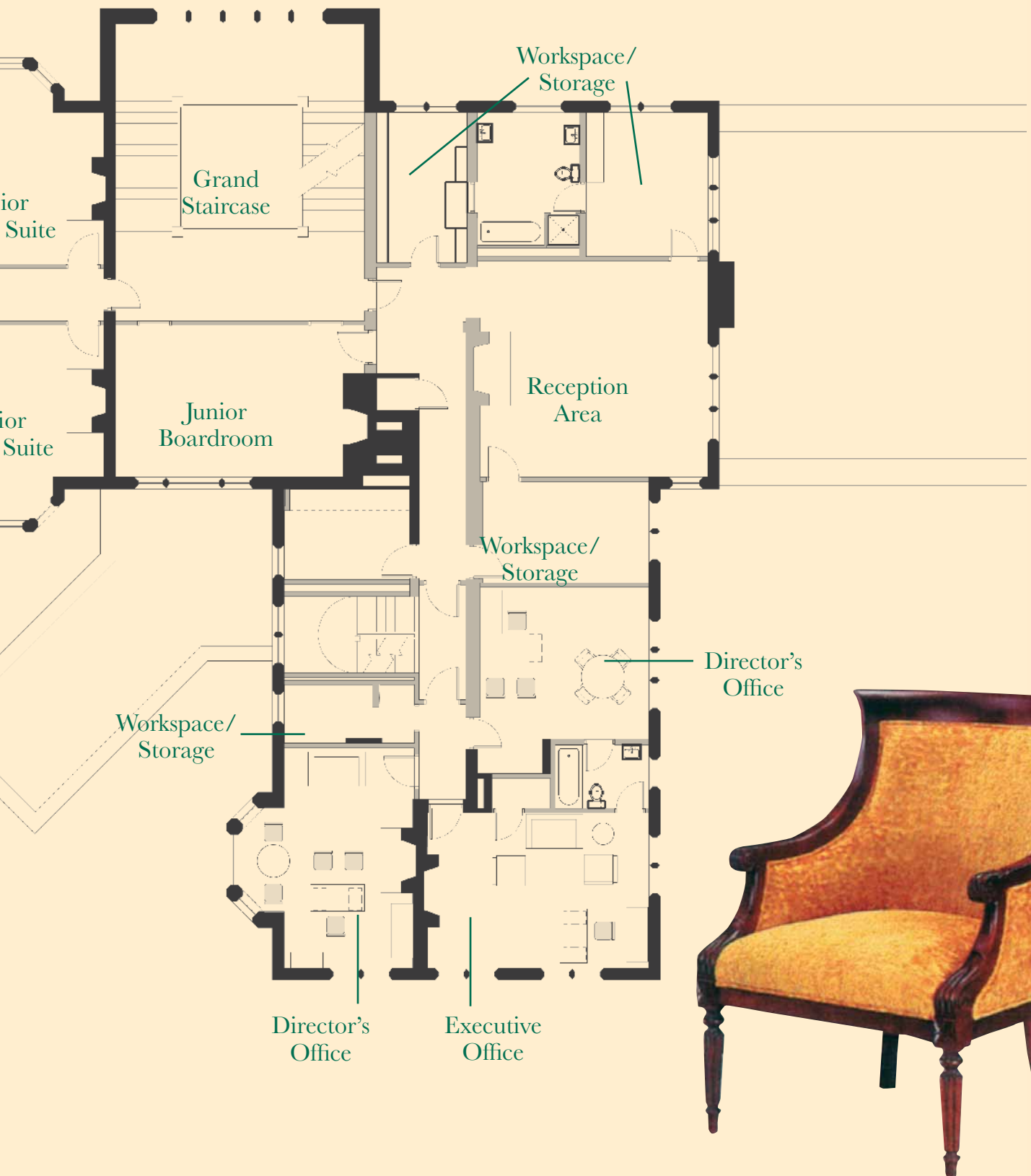
### **Dedication Plaques**

Plaques will be commissioned to dedicate the building and honor those whose vision has resulted in this great monument to the strength and stability of our Fraternity. One will honor the Cornerstone Donors, whose investment made the purchase of the building possible. The other will recognize the Fraternity and Foundation boards and staff who completed the project and were the first to use the new building. These will be mounted permanently.

*second floor plan*







# *second floor sponsorship opportunities*

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## **PRIVATE ROOMS**

### **Presidential Guest Suite**

Six former guest rooms will be restored in high period style, and this will be the most impressive. Approximately 600 square feet, with a private bath and glorious bay window facing the lawn and woods, the Presidential Suite will be designed to accommodate our most important guests. VIP donors, national officers and guest speakers or educators can experience what it might have been like to stay at Laurel Hall at the height of its grandeur. The sponsorship will repair plaster, paint and refinish wood floors, provide period furnishings and rugs, improve climate controls and completely restore the private bathroom. The result will be an overnight stay worthy of a VIP.



*An example of possible furnishings.*

### **Junior Guest Suites**

Five smaller guest suites will complete the guest area. Somewhat smaller than the Presidential, these also will be redone in a period style, but updated to provide comfort and luxury. Large bay windows are the focal point of four rooms, each two sharing large baths. The sponsorship will be used to repair plaster, wood, tile and paint and rehabilitate the old bathrooms, including two amazing copper walk-in surround shower spas, circa 1922. Period furnishings from the Heritage Hall collection, wall and window treatments and oriental rugs will complete the space.

### **ELC Suite/Apts.**

Our Educational Leadership Consultants (ELCs) are on the road eight months of the year. When they're in town, they will have apartment space at Laurel Hall. Otherwise, the space will be available to house any overflow from the guest rooms or, eventually could be converted to space for a live-in housekeeper

and building manager. The sponsorship will allow a conversion of the space to improve living and sleeping areas and to renovate three bathrooms to accommodate up to five guests.

## **EXECUTIVE OFFICES**

### **Fraternity Wing**

The Fraternity's executive and support staff offices will reside on the second and third floors of the north wing. The second floor will house the reception area and offices of the Executive Director, Asst. ED and Director of Chapter Services. It will be decorated in a period style using antiques from the Heritage Hall collection to compliment the rich oriental rugs and original decorative crown molding. The third floor will house all the support staff offices. The hallways will display historic photos and memorabilia of the Fraternity. The sponsorship underwrites the renovation and repair of the area, including important historic preservation work, HVAC and electrical improvements, carpeting, plaster and paint.

### **Executive Office**

The office of the Executive Director will enjoy rich wood floors, a large fireplace and decorative plaster crown molding. The furnishings will reflect an executive suite from the early 1900s and will be a place worthy of meeting with alumni and guests. Fine artwork and an oriental rug will provide quality accents and historical pieces to recognize past Executives will be displayed here. The sponsorship funds will be used to renovate the suite and bathroom, repair or replace worn windows and provide needed furnishings.




### **Junior Board Room**

A junior board/meeting room is located at the entrance to the Fraternity wing on the second floor and will provide space for staff meetings and education and training sessions. A small board table and chairs, wall mounted dry erase board, Internet access and conferencing phone will make the space useful. The sponsorship allows the repairs, improvements and furnishing of the room.

### **Reception Area**

The Fraternity reception area will be created from the original master bedroom. A large, airy space with fireplace and fine wood floors will be complimented by period furniture and a large oriental rug. The room will provide a conversation area for up to six. The walls will be hung with historic photos, plaques and artwork. The sponsorship allows improvements and furnishing of the room.



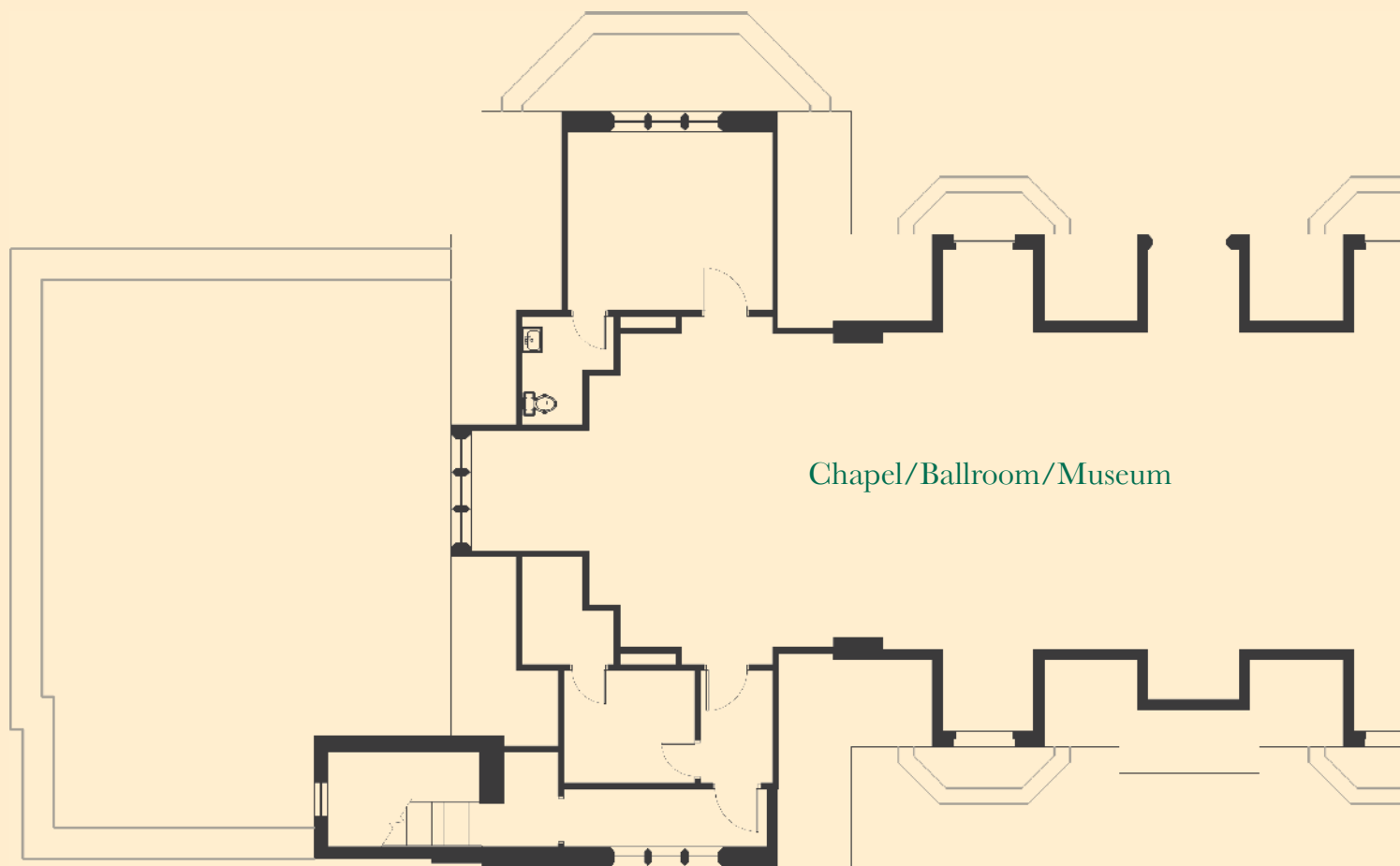


*The Fraternity's strength is derived from its members, so it might seem disingenuous to say that the acquisition of Laurel Hall will directly improve the Fraternity. However, we don't see the new Headquarters as a simple repository for our relics and staff, but as a living component of the rich history of Phi Kappa Psi. Phi Psi has been a symbol of personal excellence and integrity for more than 150 years. Laurel Hall will stand as a physical reminder of the lofty ideals of our Founders, and we will continue to reap the rewards of this remarkable asset long into the future.*

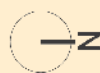
*Shawn Collinsworth,  
Executive Director*



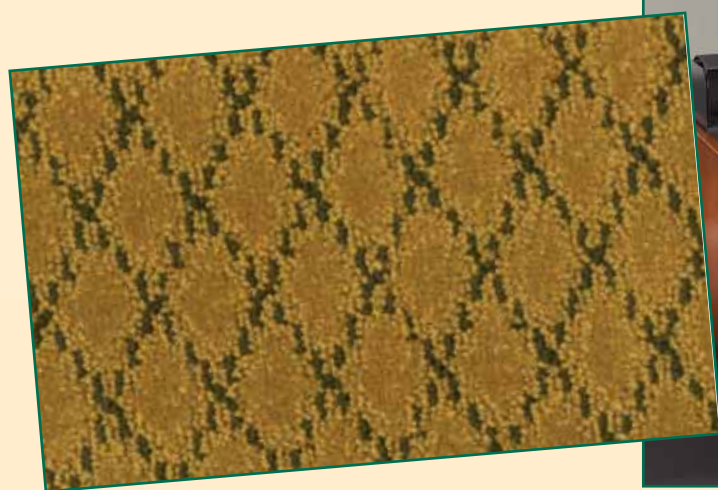
# third floor plan



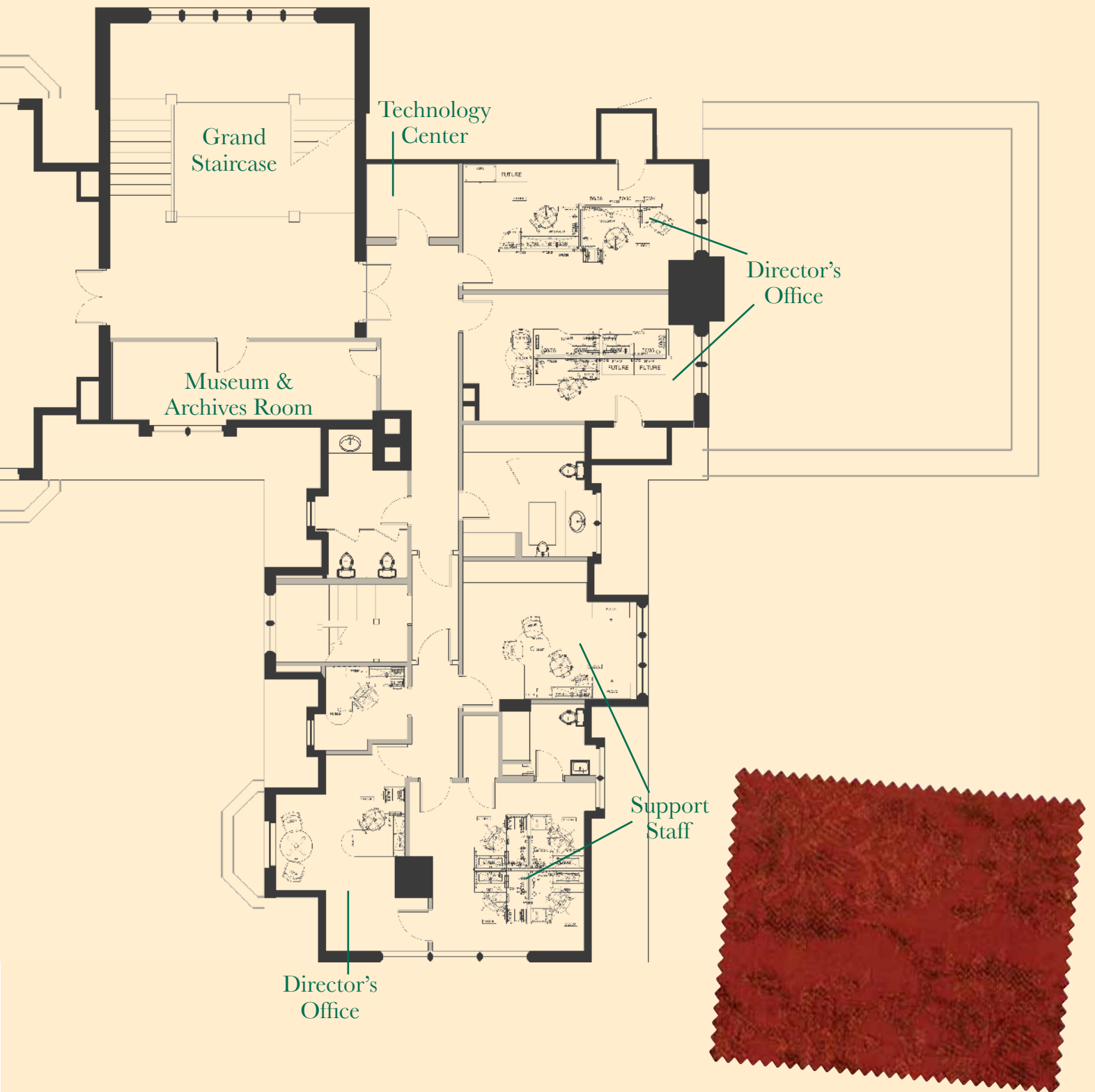
1 THIRD FLOOR  
SCALE: 1/8"=1'-0"



0 5 10 15 20 25 FT







# Third floor sponsorship opportunities

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## **PUBLIC ROOMS**

### **Museum & Archives Room**

We'll be moving our archives, memorabilia and artwork from Heritage Hall and need a suitable display room. This room will be just off the stairway on the third floor and will house several display cases, as well as wall displays. The sponsorship will underwrite the refinish of the room, addition of security and climate control systems, and the work necessary to properly document and display the many important historical pieces of our collection.

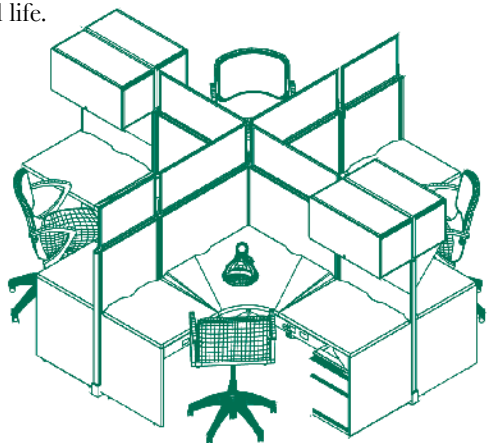
## **PRIVATE ROOMS**

### **Chapel/Ballroom & Museum**

Laurel Hall was known across the Midwest for its large and beautiful third floor ballroom. Highlighted by its impressive ceiling of vaulted Gothic arches, this is a space worthy of very special celebrations. Used as a chapel by the girls of Ladywood School, the room is lined with contemporary stained glass windows in an opalescent pink and green, reminiscent of Tiffany. The sponsorship will pay for the repairs of plaster, paint and stained glass and the refinish of the herringbone patterned white oak floors, as well as the addition of period lighting.

### **Technology Center (audio, video & web)**

Communicating with undergraduates these days requires technology and our goal is to have a center capable of creating and broadcasting audio and video programming to chapters and alumni. The creation of educational programming, training workshops and informational guides, as well as the ability to document historical events, warehouse interviews with notable Phi Psis and provide dynamic Web content, is a necessary function for any organization focused on college and fraternal life.



### **Directors & Support Staff Offices**

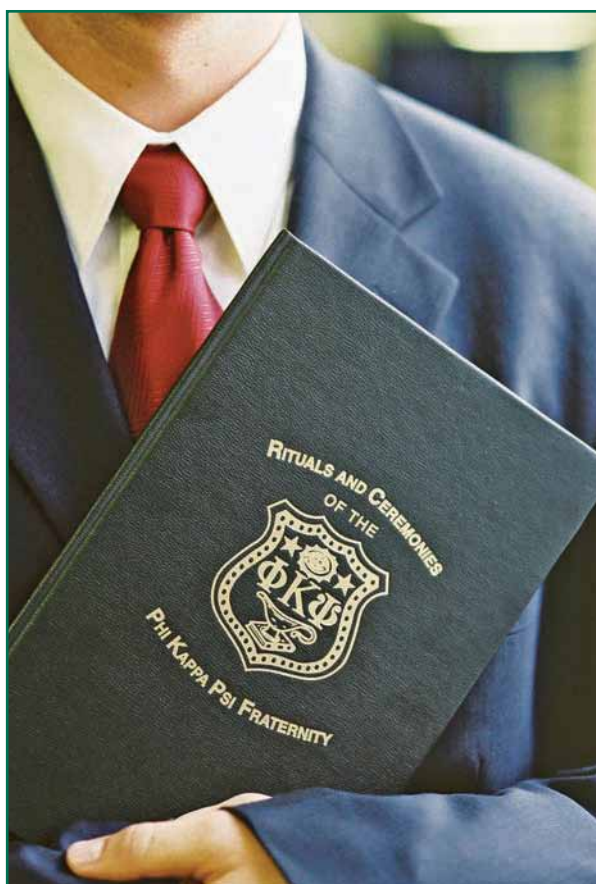
Director and support staff offices on the second and third floors need extensive work to repair water damage to plaster and wood floors and window frames that have become rusted or warped. Furnishings and accessory items will make these offices comfortable and significant file and storage space will be

provided. HVAC and electrical systems must be upgraded and Internet service added. The sponsorships will underwrite all this work.

## **HISTORICAL, HONOR AND MEMORIAL (INDOOR)**

### **Historical Displays/Walking Tour**

There is great history in Laurel Hall and the people who have passed through its doors. This project will provide for historical research resulting in an audio and video tour of the property and pamphlets that can be used on a walking tour of the building and grounds. In addition, several displays are planned for public areas, to document the phases of Laurel Hall as a private residence, a Catholic girls' school, a condominium club house and the Hudson Institute.



### **Archive/Memorabilia Display Cases**

In the third floor museum room and ballroom, and in a few other strategic spots in the building, we will have display cases of Fraternity and period memorabilia, archives and items of interest. These cases will be designed to be temperature and humidity controlled and UV resistant and will protect as well as display our important artifacts.



## *The resource*

Perhaps the most exciting feature of the Laurel Hall purchase will be its ability to become a destination for Phi Psis around the country. Already we're getting "road trip" groups of alumni and undergraduates who heard the news through the grapevine. No doubt the volume will grow after this edition of the magazine.

Over the last several decades Laurel Hall has hosted innumerable special events. From wedding weekends and receptions for local and international dignitaries, to corporate retreats, speakers series and holiday events, Laurel Hall has become a unique and historic venue for some of the important private and public events in Indiana.

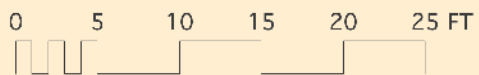
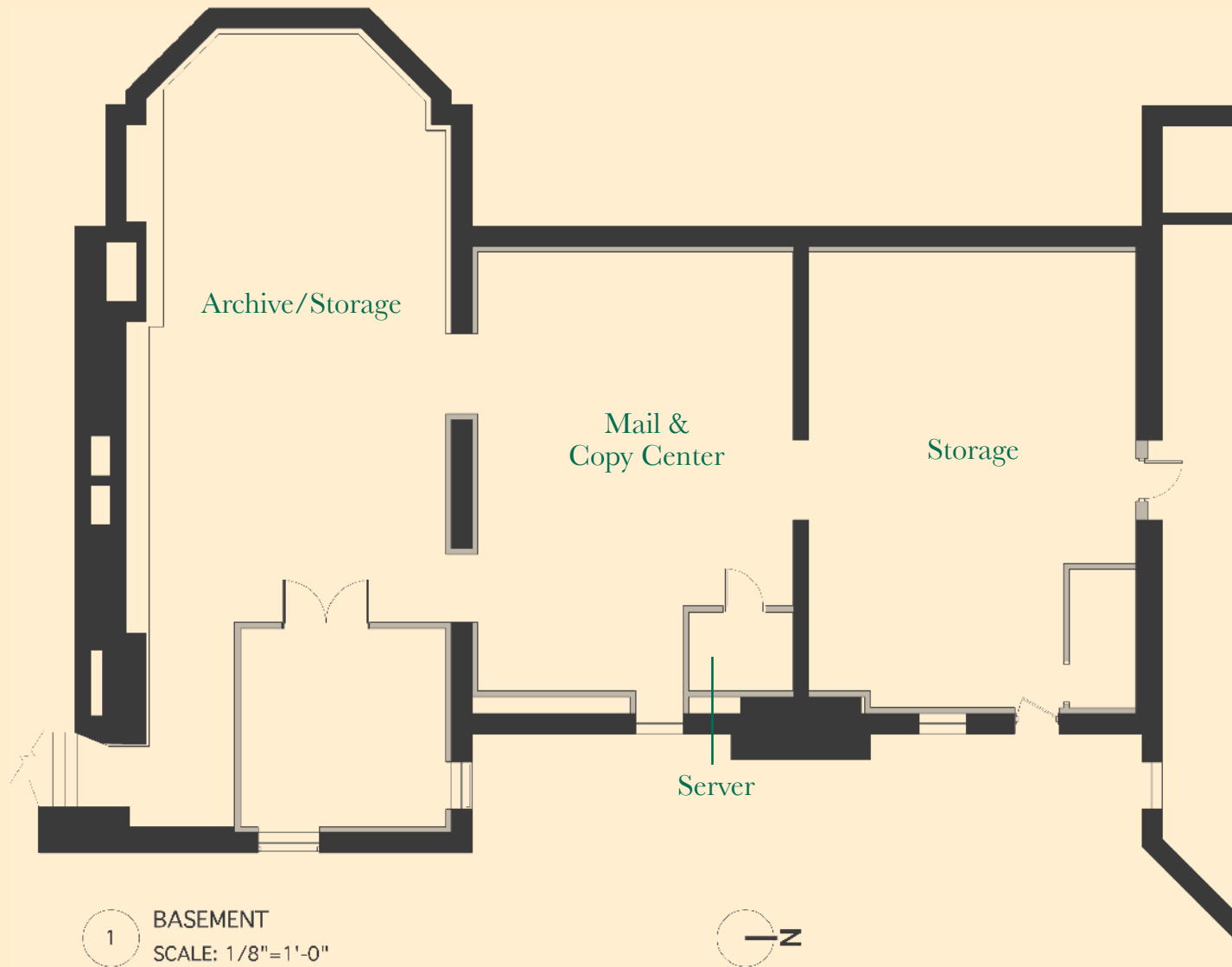
With almost 10,000 square feet of meeting, conference and receiving space and two beautiful dining areas, Laurel Hall is a resource Phi Kappa Psi can be proud to share. The same impressive space that will serve us during Fraternity events also can generate revenue to help with the long-term maintenance and improvement of the building.

Phi Psi alumni, family and friends can help support Laurel Hall by considering it as a location for their special event. For a Phi Psi wedding, reception or for your business meetings, our approved list of caterers can make your event something truly memorable. If you plan an event in the Indianapolis area, consider Laurel Hall. You'll have an unparalleled location and will be helping us protect the property for the future.

**For more information about renting Laurel Hall, contact us at 317-275-3390, or visit the website at [www.laurel-hall.org](http://www.laurel-hall.org).**



# basement floor plan









# basement sponsorship opportunities

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## PRIVATE ROOMS

### Alumni Lounge

The Billiards Room was Mr. Fletcher's hideaway. Located in the basement level, the room is accented with hardwood paneling and teak floors. Damaged by moisture, the room will take work to restore it as a new alumni lounge. The sponsorship will be used to stop water damage and repair wood, stone and metal in the room. We'll add furniture befitting a gentlemen's lounge, as well as upgrade the HVAC. The finished lounge will be a place for less formal private gatherings of brothers.

### Foundation Call Center

The Endowment Fund will be using the wealth of new space to install a call center in Laurel Hall. The call center will be an important resource in our mission to communicate with donors, support Fraternity and chapter fundraising and could be uti-

lized for regional or national event promotion and registration. The sponsorship will underwrite the computer hardware and software, network, phone and electrical upgrades and startup costs of staff and training. It is expected the call center will pay for its ongoing costs each year and will grow to become a vital part of the Endowment Fund's annual donor communication and fundraising activities.

### Mail and Copy Center

The Foundation and Fraternity do much of their work by print and mail. A modern and efficient mail, print and copy center is vital to the ability to communicate with undergraduates and alumni. The sponsorship will refurbish the space and provide us with modern mailing and print/copy equipment.

# exterior & grounds sponsorship opportunities

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A landscaping master plan has not yet been developed for the property. We are in discussion with several firms, as well as the historic landscaping department of one of the state universities. The following items have been identified as worthy components of any final plan. Precise locations for each item will be addressed in the master plan.

### Fountains

The original grounds had several fountains and ponds, so water features will be an important component of any renovation. One grand fountain at Laurel Hall's entrance will anchor a new brick drive, providing better vehicle access to the front entry. Another fountain off the back patio, at the foot of the steps, will be the centerpiece of the first view most visitors will have as they approach the building. The sponsorships will underwrite the fountains and the plumbing and electrical work needed for their installation.

### Sculptures & Planting Beds

We will be clearing and replanting several beds around Laurel Hall to enhance the building and its landscape. In the spirit of the early Laurel Hall gardens, we'll add sculptures in scenic clearings. Plaques will mark the sponsors of each planting bed and sculpture, which also can honor or memorialize any Phi Psi.

### Memorial Benches

In several places on the six acre lot, we will be restoring or creating sitting areas for quiet contemplation or to take advantage of particularly scenic views. These benches, which can be named for living or deceased members, will provide comfortable respite for visitors as they walk around the grounds.

### Lighting & Lamppost Restoration

Strategically placed exterior lighting will include period lampposts, lamps and floods to enhance the safety and the scenic view of Laurel Hall at night. Existing period lamps will be restored and complimentary lighting will be added around the grounds.

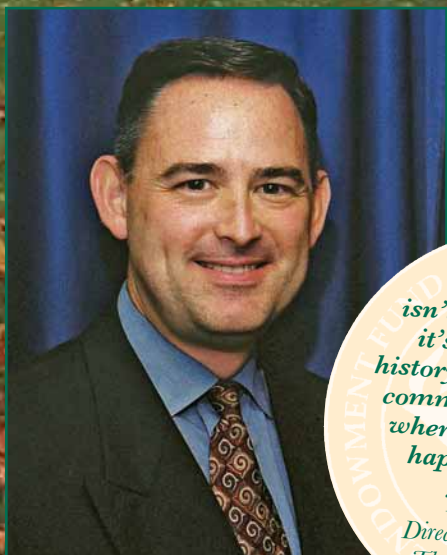
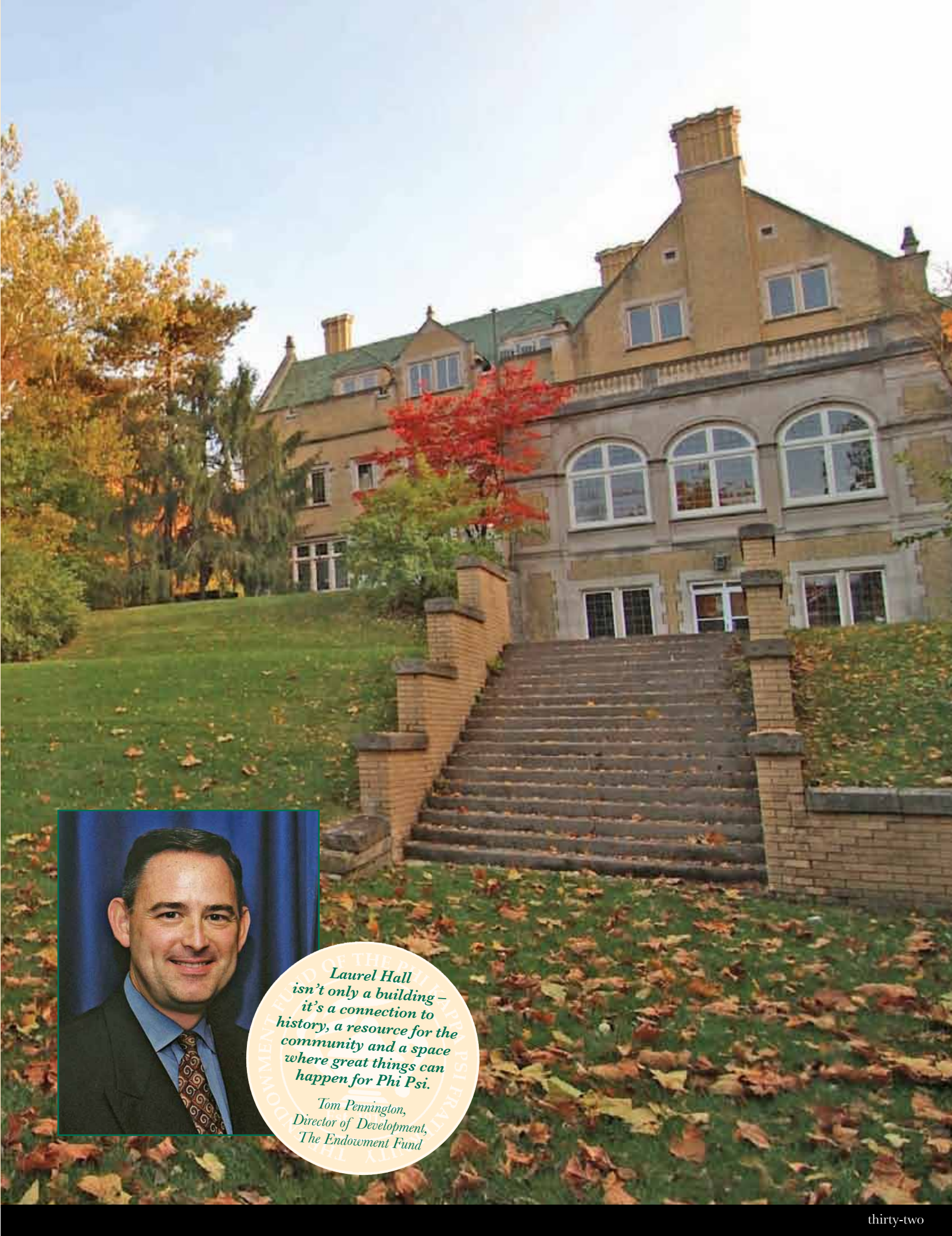
### Tree Pruning and Plantings

The Laurel Hall grounds are a joy for area arborists. The original landscaping was done by a Polish architect who brought with him plantings from many areas of Europe. Some trees here exist in few other locations in the Midwest. These will be identified and labeled for their uniqueness, while new plantings will set the stage for an improved landscape in the future.

### Named Bricks

Laurel Hall bricks will be used in several areas to improve the property. From the paver stone entryway to the brick patio and walkways, sponsors will have their name and chapter engraved on their brick and added to hundreds of other sponsor bricks to create our new landscape. Truly this is a way for every member to be a part of our new Phi Psi home!





*Laurel Hall  
isn't only a building –  
it's a connection to  
history, a resource for the  
community and a space  
where great things can  
happen for Phi Psi.*

*Tom Pennington,  
Director of Development,  
The Endowment Fund*

# laurel hall sponsorship opportunities

## FACILITY

Building Purchase (eight)..... **7 SOLD** \$200,000

## PUBLIC ROOMS

Grand Lobby..... \$150,000

Elevator ..... \$150,000

Executive Board Room ..... **SOLD** \$100,000

Dining Room ..... \$50,000

Grand Staircase..... \$50,000

Kitchen..... \$50,000

Museum & Archives Room..... \$50,000

Music Room..... \$50,000

Solarium..... **SOLD** \$50,000

## PRIVATE ROOMS

Chapel/Ballroom & Museum ..... \$150,000

Alumni Lounge ..... \$100,000

Foundation Call Center ..... \$100,000

Presidential Guest Suite ..... \$100,000

Junior Guest Suites (five) ..... \$50,000 each

Mail and Copy Center ..... \$50,000

Technology Center (audio, video & web)..... \$50,000

ELC Suite/Apts. (two) ..... \$25,000 each

## EXECUTIVE OFFICES

Foundation Wing..... \$100,000

Directors Office..... \$50,000

Trustee Office..... \$50,000

Fraternity Wing ..... \$150,000

Executive Office ..... \$75,000

Junior Board Room..... \$50,000

Reception Area ..... \$50,000

Directors & Support Staff Offices (seven)..... \$25,000 each

## HISTORICAL, HONOR AND MEMORIAL (INDOOR)

Donor Wall of Honor ..... \$50,000

Memorial Wall ..... \$25,000

Historical Displays/Walking Tour ..... \$25,000

Dedication Plaques (two)..... **1 SOLD** \$7,500 each

Archive/Memorabilia

Display Cases (twelve) ..... **3 SOLD** \$2,500 each

## EXTERIOR & GROUNDS

Fountains (two) ..... \$25,000 each

Plaques/Sculptures/Planting Beds (est. ten)..... **1 SOLD** \$2,500 each

Memorial Benches (ten) ..... **SOLD OUT** \$1,000 each

Lighting & Lamppost restoration (est. ten) ..... **2 SOLD** \$500 each

Tree Pruning and Plantings (est. twenty) ..... \$250 each

Named Bricks (up to 2,500)..... \$250 each



# letter of intent

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*What a fantastic opportunity for Phi Kappa Psi! I want to support the purchase and improvements of Laurel Hall.*

1. Enclosed is a check for my one time gift of \$ \_\_\_\_\_
2. Please bill my credit card for a one time gift of \$ \_\_\_\_\_  
☐ AmEx ☐ Discover ☐ MC ☐ Visa  
Card Number: \_\_\_\_\_  
Exp. Mo/Yr: \_\_\_\_\_  
Signature: \_\_\_\_\_
3. Please bill the credit card above for repeating gifts of \$ \_\_\_\_\_ to be charged  
☐ Monthly ☐ Quarterly ☐ Annually for a total of \_\_\_\_\_ transactions and  
a total gift of \$ \_\_\_\_\_
4. Please accept my commitment for a Laurel Hall Campaign gift totaling \$ \_\_\_\_\_  
I would like to fulfill this obligation as follows: \_\_\_\_\_ payments of \$ \_\_\_\_\_  
each, to be paid ☐ Monthly ☐ Quarterly ☐ Annually over the next year(s).
5. Please apply my gift(s) to the following applicable sponsorship opportunity:  
☐ Please use my name \_\_\_\_\_  
☐ Please honor the following individual: \_\_\_\_\_
6. Please contact me regarding the sponsorship opportunities for Laurel Hall (phone below).
7. Please contact me regarding the transfer of stock and/or securities (phone below).

## *Statement of Understanding Regarding the Payment of Pledged Gifts*

I support the Endowment Fund and the work it does and will make every effort possible to fulfill the commitment made above. However, I understand this pledge is not a legally binding commitment, nor can it encumber my estate. If, due to unforeseeable circumstances, I am unable to complete the payments on my pledge, I will inform the Endowment Fund promptly.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Chapter: \_\_\_\_\_ Init. Year: \_\_\_\_\_

*Pledging your support to the Endowment Fund and Laurel Hall is easy.  
Choose from one of three options.*

1. Mail a completed letter of intent to The Endowment Fund, 5395 Emerson Way, Indianapolis, IN 46226
2. Fax a completed letter of intent to: 317.275.3401
3. Call the Endowment Fund at Laurel Hall at 1.800.350.1852

# additional giving options

The Campaign for Laurel Hall is one of the most exciting events in the history of Phi Kappa Psi. This is a chance for individual alumni and their families and friends to make a direct connection with the future of the Fraternity. Laurel Hall will serve Phi Psi for decades to come, as a center of activity and events, a site for education and research and host to alumni and friends from around the world. This may be the one chance to have your name in a place of prominence for all our guests to see and appreciate.

In addition to gifts of cash or stock, which are most appreciated, please consider these alternative giving strategies for Campaign gifts. Some may allow you to participate at significantly higher levels. Laurel Hall is owned by the Endowment Fund of the Phi Kappa Psi Fraternity, a 501(c)(3) charitable and educational foundation. Gifts to the campaign are therefore deductible to the donor to the full extent of the law. The building also is an historical treasure

and we will be applying to the National Register of Historic Places. That may provide additional incentives for funding.

## FAMILY/PRIVATE FOUNDATION GIFTS

If you direct giving within a family or personal foundation, consider a gift to the Laurel Hall Campaign. Several donors already have made gifts from their philanthropic funds, trusts or from their family foundations. Whether the foundation is for any charitable purpose, or may focus on historic preservation or renovation, gifts may be safely directed to the Endowment Fund. Those gifts also can be made as memorial gifts, to honor the name of departed brothers.



*Laurel Hall's magnificent three-story carved walnut staircase.*

## CORPORATE GIFTS

Corporate gifts are welcome and sponsorship opportunities apply to these gifts as well. If you are the CEO or owner of a commercial enterprise – with or without a corporate foundation – consider making an investment in this worthy campaign through your corporate giving program. And, if your corporation matches charitable gifts, your personal gift can be increased through the employee







*A view of Laurel Hall's front entrance during this season's first snowfall.*

matching program. Indianapolis and Indiana corporations, in particular, may have a mission that includes investments in local charitable organizations or historic properties.

### **GIFTS IN KIND**

Gifts of merchandise or services needed for the renovation and improvement of the property will be considered on a case by case basis, but we welcome your ideas. A brief list of anticipated need is listed below. Gifts of fine art and antiques also are welcome for the guest rooms and public and display spaces within the building. Contact the Endowment Fund for more details.

### **ANTICIPATED NEEDS**

**Services** - Landscape architect; Landscape design; Landscape labor; Kitchen design; Kitchen rebuild; Restoration services (wood, marble, limestone, tile); Plumbing; Electrical; HVAC; Masonry/Paver stone.

**Materials** - Ongoing maintenance supplies (paper products, cleaning supplies and chemicals, light bulbs, etc.); Maintenance equipment (vacuums, floor buffer, mops, brooms, etc.); Commercial kitchen equipment (range, ovens, fridge; cooking/serving pieces); Plumbing fixtures (reproduction of period pieces); Plantings for landscape (shrubs, saplings, ground cover, ivy, etc.); Water features (fountains and ponds); Period furnishings and artwork.

We want Laurel Hall to be a showplace for the community as well as our HQ. If you or your company can provide for these needs at low or no cost, please contact us.

**5395 Emerson Way  
Indianapolis, IN 46226-1415  
317.275.3400**

*"I think that we will feel a new sense of freedom because of the increased physical space. Heritage Hall has become extremely cramped and would have had difficulty accommodating the staff that our Fraternity will need as we grow. In addition, the on-site conference space will give us the capability to hold conferences and meetings at a lower cost per person, which will lead to increased opportunities for the Fraternity to involve undergraduates and alumni."*

*Tryon Hubbard, Secretary,  
Executive Council*





# *brick campaign - a pathway to the future*

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## **BE A PERMANENT PARTNER IN PHI PSI'S FUTURE.**

If you are drawn to things that endure, a donation of \$250 will allow you to show your support in a highly visible and meaningful way. When you purchase a brick for the pathways of Laurel Hall, you're investing in far more than the sidewalk, patio or drive. You are supporting student scholarships and educational programs that will take place at Phi Psi's new education and learning center.

Not only will you be a lasting part of Phi Psi history, you'll also be part of a lasting education for undergraduate Phi Psis. Imagine seeing your name or the name of a friend, family member or chapter brother permanently engraved in the pathways of Laurel Hall. Buy a brick and be part of tomorrow's education today.

## **BE PERSONAL.**

Name yourself or pay tribute to your family. Bricks can be purchased to commemorate any number of occasions. What a great way to honor a pledge brother, recognize your pledge class, record a special occasion, or honor a loved one. A limited number of bricks are available so order early – and order as many as you like!

Bricks will be four inches by eight inches. They will be in a color chosen to compliment the building and landscape. Each brick will have up to three lines of engraving with a maximum of 18 characters per line.

## **BE CONNECTED.**

Your brick will be part of the permanent walkways and plazas that connect Phi Psis new education center to the greater property. Surrounded by six acres of wooded and landscaped grounds, Laurel Hall will provide a comprehensive mix of education and training resources for the 21st century.

By purchasing a commemorative brick you not only will mark your place in history, but your contribution also provides the financial support to achieve our mission – to foster the development of leaders and to promote academic excellence in higher education.

Brick by brick, we can build a strong foundation and provide a sense of pride, a sense of purpose and a first class presence for Phi Psi for generations to come.

To cement your place in Phi Psi history, make your gift today.



JOHN M. HALL  
INDIANA ALPHA '68

IN MEMORY OF  
W. DAVID O'NEAL  
CA BETA '20

*Laurel Hall  
is a building whose  
image portrays strength.  
A headquarters building  
acts as a window on to the  
entire organization. Through  
Laurel Hall, the Fraternity  
will continue to convey the  
image of excellence amongst  
the Greeks.*

*Allan Rysin,  
District I Archon*

*"We were  
very lucky to find  
a building that suits  
both our needs and  
our historic profile."*

*Stu Rhodes, Treasurer,  
Executive Council*

1979 PLEDGE CLASS  
TEXAS ALPHA  
UNIV. OF TEXAS



# *Sonors to State*

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## **CORNERSTONE DONORS:**

### **\$200,000 OR MORE**

James W. Emison, *DePauw* '49  
Donald V. Fites, *Valparaiso* '53  
D. Bruce McMahan, *USC* '57  
Jerry Nelson, *UCLA* '48  
A. Scott Noble, *Texas* '81  
J. Gilbert Reese, *Ohio State* '47  
Dennis J. Schwartz, *Purdue* '60

### **\$50,000 - \$199,999**

John R. Donnell Jr., *Case Western* '59  
James B. Franklin, *Texas* '43

### **\$10,000 - \$49,999**

John Brian Dimmer, *Oregon* '81  
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### **\$2,500 - \$9,999**

Neil B. Ballard, *Minnesota State-Mankato* '71  
John V. Ciccarelli, *Cal State-Northridge* '72  
Durwood L. Keller, *Southwestern Louisiana* '78  
Robert E. Lazzell II, *West Virginia* '85  
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### **\$1,000 - \$2,499**

Walter W. Baz, *Washington* '41  
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James D. Campbell III, *Cornell* '90  
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David A. Renner, *Syracuse* '59  
William E. Reynolds III, *DePaul* '93  
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Theodore T. Teegarden, *Indiana* '49  
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Donald R. Bonine, *Michigan State* '60

### **\$1 - \$999**

Benjamin James Bowman, *Minnesota* '99  
John F. Buck, *Indiana* '75  
Donald P. Carter, *Missouri* '47  
Jacklyn H. Cole, *Phi Kappa Psi Staff*  
Shawn M. Collinworth, *Indiana State* '91  
Robert A. Gibson, *Swarthmore* '53  
Kyle Fariss Jordan, *Valparaiso* '97  
Jake Koenig, *Endowment Fund Staff*  
Robert Michael Kort, *Indiana* '88  
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Claude M. Warren III, *Butler* '95  
Paul R. Wineman, *Washington* '55  
Texas Epsilon Chapter - *Stephen F. Austin Univ.*

Special thanks to Brother Denis Ryan Kelly Jr., *Wabash* '81, for providing his time and services in supplying the current Laurel Hall photos (unless otherwise noted) seen in this magazine and various other Phi Psi materials. For more information on his photography, please visit [www.deniskelly.com](http://www.deniskelly.com) or contact him at 317-297-4330.



## How to change your address

Head to [www.phikappapsi.com](http://www.phikappapsi.com) or e-mail your old and new address to [WMS@phikappapsi.com](mailto:WMS@phikappapsi.com). You may also FAX the change to 317-637-1898, call 1-800-486-1852, or send a letter to the HQ at 5395 Emerson Way, Indianapolis, IN 46226. If your update does not occur immediately we ask your patience during this time as we make a change that will allow us to better serve you.

## How to contact The Shield

Email: [rjp@phikappapsi.com](mailto:rjp@phikappapsi.com)  
Mail: RJ Proie, 5395 Emerson Way, Indianapolis, IN 46226  
Fax: 317-637-1898  
Call: 317-632-1852 ex. 25 or just ask for the Director of Publications

## How to get published

Undergraduates: Each chapter's AG or corresponding secretary is that chapter's correspondent for *The Shield* and for the [PhikappaPsi.com](http://PhikappaPsi.com). For submission requirements or deadlines, he may contact the Director of Publications. All photos must be sent via regular mail. All text submissions must be submitted via e-mail to [rjp@phikappapsi.com](mailto:rjp@phikappapsi.com).

Alumni: Alumni are strongly encouraged to submit news and stories to *The Shield*. Tell us about events or your accomplishments. If you have news about an individual alumnus, mail information to the address above care of RJ Proie, Director of Publications.

## Estimated deadlines for submissions

The following deadlines are estimates. For updates email [rjp@phikappapsi.com](mailto:rjp@phikappapsi.com). Due to pre-press and production schedules, 1-3 issues may appear before a submission is published. Submission is not a guarantee of publication. The Editor of *The Shield* reserves final call in all matters concerning submissions. *The Shield* is dedicated to being a magazine of, by and for its members. Chapter newsletters appear in the summer and winter issues.

winter issue-October | spring issue-February | summer issue-May 21 | fall issue-August 1

## How to send a letter to the editor

We always welcome your comments – both positive and negative – about this publication. E-mail the Editor at [SMC@phikappapsi.com](mailto:SMC@phikappapsi.com) or send mail to Shawn Collinsworth, 5395 Emerson Way, Indianapolis, IN 46226.

The *Shield* consistently seeks talented artists, photographers and writers to supplement the magazine on a generally *pro bono* basis. There are plenty of things going on in the world of Phi Psi, and we want to highlight as many as possible! Contact us with your ideas or your interest, and we can come up with ideas for you. We accept word-processed writing, digital photos (.jpg or .tiff, please) and printed photographs, as well as scans or quality copies of original drawings. If you would like to see your work published in the *Shield*, contact the Headquarters.

Dear Sirs,

First allow me to introduce myself. My name is Darius Grigaliunas, Indiana Gamma '96, and I am a graduate of Denison University, however, attended Wabash College my first two years of undergraduate schooling. I am a brother of Phi Kappa Psi, and was pledge class president my freshmen year in 1995.

The reason I am writing to you is recently I swam as a member of the Lithuanian National Team in the Olympics. I wish I had written this email earlier, as I believe joining Phi Kappa Psi was a very strong building block in my development. The Olympics takes the top 300 swimmers in the world, and I am proud to say that Mark Spitz is not the only Phi Psi to have climbed this mountain. At our Fraternity house in Crawfordsville, I cannot stress enough how helpful the brotherhood was in increasing my levels of commitment and determination in whatever I attempt to accomplish. Yes, Phi Kappa Psi is built on the principle of serving others. However, sometimes in these ways we inturn help ourselves. Anyway, I just wanted you to know that a Phi Kappa Psi badge was worn on the track during opening ceremonies.

Thank You,

Darius Grigaliunas...

Darius Grigaliunas

Lithuania 



# The Implicit Social Contract: To Give Back for What We Gained

**By Ed Jensen, Washington Alpha '56, President & CEO, VISA (retired);  
formerly Vice-Chairman and COO, U.S. Bancorp (retired)**

## *Lifelong Brotherhood and Responsibility Through the Eyes of a Washington Alpha Alumnus*

There are brothers in this room to whom I have not spoken in decades, until recently. Yet, despite time, the bonds of friendship return through shared memories and experiences. The chapter was a sort of collegial "gang," bound not by drugs or violence but by the lessons of cooperation and mutual support. We learned discipline, cooperation and compromise in an atmosphere of self-governance. And we learned from each other, gaining common values and loyalties around the notion of brotherhood. The experience made us accepting and nonjudgmental of each other then, and even now.

The 1950s were golden years for the Greek System. But the mores of the environment then also encouraged a fraternal elitism and conformity, eventually providing fertile ground for a counterculture to emerge. We shared a wonderful era of tradition, but we were also the forerunners of social change that began in the next decade.



**Ed Jensen,  
Washington  
Alpha '56**

## My Phi Psi Experience

I joined the Fraternity because I needed a place to live. The big bonus was an environment that made a huge difference in my life.

What institutional influences made a major difference in your life?

Personally, I can list three or four, but the Fraternity is one.

Now, I ask myself, "If the Fraternity made a difference in my future, have I, in turn, made a difference in its future? And was there an 'implicit social contract,' an obligation to give back for what I gained?"

I'll answer these questions in a moment.

When the plane arrived in Seattle from my home in Hawaii, I knew no one. I can't begin to describe how different it was from Honolulu. Phi Psi was the best of the good fraternities that I visited. I thought, "This is where I want to belong." I found that I was one of 43 pledges, all strangers, now to be considered brothers. But I didn't like the rules, the discipline, the hacking, or pledge servitude. When I got off that plane from Hawaii, I was an immature kid, possibly headed for trouble.

I remember I was upset one day when an upperclassman hacked me too hard for some infraction. Mildly stated, I was insubordinate. This landed me in the library for a disciplinary meeting with the Governing Committee. I was given a choice: conform or become homeless. I chose to curb my temper and behave.

That meeting saved me from myself, and I got down to the business of being a fraternity man. My insecurities began to diminish, and I began to grow. I



bought a cool Harris tweed jacket and a couple of rep silk ties, learned Phi Psi history and songs, and school songs, too. I performed my pledge duties diligently, even found them fun, working with my pledge brothers. I decided to use study hours to do just that, and as the quarters passed, my grades steadily improved. I learned table manners and socially correct behavior; pledge Brother Gordie Burgess taught me to dance, Ken Hart taught me how to talk to women. The Fraternity gave me time to grow up and gain social skills, preparing me for a career I would never have anticipated. All things considered, it was a great place to live! I met my future wife through the Fraternity, another of those major events that changed my life.

Twenty-six in my class were initiated and, after four years, went our separate ways. The notion of brothers and brotherhood vanished, although the connection was still there.

## Changing Perceptions

Through the years that followed, I didn't like what I read and heard of fraternities: drinking and drug clubs where sex was the common value. I rejected fraternities as valuable institutions. Or were they just a reflection of changes in society which I didn't like? I felt that they were in a state of decay. Yes, there was a social contract to give back for what was taken, but the institution that gave it to us, for me, was dead. Not giving back became an easy decision. I became very anti-fraternity. I've learned since that our chapter has had highs and lows throughout the years. Thankfully, it has survived, while some other fraternity chapters at Washington have declined and failed.

Through it all, a determined minority of alums have stayed with it, thinking it was possible to "go back to the future." They honored that implicit contract to give back, with time and money.

## A Personal Change

My attitude made a 180-degree turn when I was invited to speak at the American Leadership Academy in Cabo San Lucas, plus meeting our undergraduates there and at Founders Day. (I have spoken at Cabo three times.) I discovered that these kids are no different than we were; they just live in a different time, under different standards. I found that the benefits of "fraternity" are still alive and well.

The best part was meeting Jerry Nelson, *California Epsilon '48*, and the "father" of the ALA, the dirt-poor kid from a single parent family, who went to UCLA on a \$100 scholarship and became a Phi Psi. It made a huge difference in his life and career, and in how he became extremely successful. Now Jerry feels strongly about that "implicit social contract" to give back. His passionate commitment to teaching leadership and character-building skills to young Phi Psis is a lengthy story in itself. In short, he feels that the ALA, with alumni-taught curriculum and mentoring, can develop youth by leveraging the values of fraternity which have become dormant. Jerry convinced me to join this effort.

## The Failed Promise

Other than what I have already mentioned, what else did we take from the fraternity experience? Let's talk about the chapter house. At one point, I was a House Manager, and I recall that our house bills paid for operating costs. Nothing, year after year, was put aside for using it — nothing for remodels, upgrades, or capital expenditures, nothing for replacing old wiring and pipes. We used what was there, left it, and the future generations got what was left over. This has continued for nearly 75 years, through those highs (when we could have set aside money) and lows (when we couldn't). The house bills were subsidized by that "implicit promise" to pay back the subsidy in the future when we could better afford it. The problem is, decade after decade, that subsidy has not been repaid. This is an economic "model" that would never work for a hotel, an apartment complex, a dormitory, an office building — even a warehouse. In fact, if we do not honor this promise, the house will close sooner or later because it cannot sustain itself.

## The Possible Consequences

The model is failing because many alumni who were subsidized don't want to give back. So, the old fraternity value system, including The Creed preached to today's undergraduates, which we swore to honor, is suspect. The result: there is less incentive for undergraduates to take care of a facility when alums seem not to care. The alumni superficially look at how the house is maintained and conclude that the students don't care, so they ask, "Why should I waste my money?"

The undergraduates see the chapter house as it is now, not as it was 50 or 60 years ago, and accept it. Indifference sets in and we've set the chapter up to eventually fail. The opportunity to help young men through the system that helped us starts to slip away. The alums, through their apathy, are allowing an institution to die, one that is as important today as it ever was. If you met some of today's undergraduates, and witnessed the Cabo leadership training, you would understand this.

## Times Have Changed

Alums can use the excuse that values are not the same today, so why support a value system that we don't understand. Before you buy into that excuse, let's see the UW and Phi Psi experience as it is today:

Average High School GPA: 3.68

Average College Entry SAT Score: 1280

UW All-Men's Average GPA: 3.15

Phi Psi Washington Alpha GPA: 3.27

Academic pressure and competition are more intense than ever. Only a small percentage of undergraduates get into the schools of their desired majors. To compete, academic scores are important for our undergraduates. They must achieve at least a 2.85 in their first quarter to be initiated. Our Phi Psis furnish their rooms with computers, video games, TVs and mini-refrigerators. They sleep in their rooms, except for pledges in their first quarter, who use the sleeping porch. They study elsewhere, in the chapter study hall, or on campus. They use the internet to prepare and submit papers, assignments and to do research.

Resumes of college activities and community service become important to develop as they go through school. They're competing, not only with other UW students, but in a world economy that is more fast-paced and complex than it was decades ago.

Formal rush disappeared 30 years ago. Now, recruitment is perpetual and extremely competitive. The fraternity chapters with the best product are the most successful. That good "product" includes academic achievement, an up-to-date facility, brotherhood and social activities.

Fraternities now don't just compete with each other. They compete with the University's tax-financed grand dormitory facilities, plus many new off-campus apartments that fill the shortage for housing.

## The Fraternity Today — And Tomorrow

Washington Alpha now, with the help of parents, alumni and Jerry Nelson, is producing a good product, despite an aged, obsolete chapter house. We can all be proud of our undergraduates. They are making a difference. The chapter currently has 44 members, of whom 32 live in the house. The live-in capacity is 53. There are virtually no town men who live at home; to join, most entering freshmen want to live in. Their house bill is \$2,000 per quarter, with another \$2,000 for school costs, minimum. There are 29 fraternities at the University of Washington, including new, strong ethnic fraternities.

We have a few unique benefits over other UW fraternities: the leadership and character-building training at The American Leadership Academy; our Cabo Fall Chapter Retreat for alums, parents and undergraduates; our annual Chapter Scholarships — about 20, totaling \$13,000 this year and gradually increasing each year; funded by income from the Chapter Scholarship Fund Account at the Endowment Fund — income earned from your contributions. We also have support from a Parents' Group and a hard-working group of volunteers in our House Corporation. Plus, we have some special facilities — the Computer Lab in the old Penthouse Room and our own Study Hall in the old sleeping porch space.

Phi Psi placed second in Greek Week this year, the main fraternity/ sorority event which includes competitive sports, games and talent show. The chapter is involved in community service with The Boys & Girls Clubs of King County, Adopt-A-Highway and other programs.

Washington Alpha undergraduates now are a quality group of young men. But, the chapter needs about 20 more. With the old facility working against them, despite the low numbers, they are doing their best to maintain the house, more so than many of the other fraternities.

Our legacy should be "*Better than all*," like the chapter house that I knew. An outstanding facility is an important element in competing with the alternatives. It can again be the best if we choose to honor that contract to give back what we have taken — and gained. *The fraternity made a difference in our lives; now we need to make a difference for it.* ■



# Making Cents of: The Bs, The Ks, & The IRAs

**By: Aaron Brachman**

Welcome to Making Cents, this is a new column that will focus on shedding some light on different topics in the world of finance. The column should be available in each issue of the Shield and will give you some basic financial information that is needed in everyone's life.

Whether you are just starting your first job out of college, or you have been working for many years, you always need to be mindful of your retirement savings. Nowadays there are so many different ways to save that it can become overwhelming. The good news is that all it takes to be successful is a little bit of discipline and prudent planning.

## What is the best way to save?

The answer hinges on your particular financial situation. There are two main approaches to saving for retirement: *Pre-tax* & *Post-Tax*. The concept behind both Pre and Post-tax investing is to give investors incentive to put money away for retirement. Each method has very distinct advantages and disadvantages.

## Summary of Pre-tax Plans:

### What to think about before you retire:

The main premise behind pre-tax plans is simple, every dollar that is put into these plans is not taxed upfront by the government. This allows you to invest more money in the beginning because there are no taxes that have to be paid right away. All else being equal, pre-tax IRAs are more beneficial the higher tax bracket you are in. The pre-tax money is then placed in different investments which earn interest or grow until you begin withdrawals. It is important to note though that there are penalties for withdrawing the money

before age 59 ?. Anything you take out early from these plans you must pay income taxes on and in addition, you are charged a 10% penalty. There are a few ways to avoid the penalty, but if you are putting money into these plans, you should have a goal of only withdrawing money in an extreme emergency. You should develop a mentality that once money enters *any* retirement plan, it is untouchable until age 59.

### What to think about after you retire:

So now that you understand the pre-tax advantages and what must be done prior to age 59 ?, let's discuss what will happen after that time. Now that you have reached age 59 ?, what are your options? How do you use the money? The answer is that you can take out as much money as you want. This may sound great, except that you have to realize that since you have yet to pay taxes on this money, every single dollar you take out **will be taxed as income**. This means that if you want to put a large downpayment on a second home or take out a large amount of money, every dollar you take

out will count towards raising your income tax bracket. The main theory behind why this is not as bad as it seems though is that when you retire, you may not be collecting as much of an income and may be in a lower bracket. Although some people start taking money out right away when they are eligible, there are a large number of people that continue to work past age 59 ½. These people are still collecting an income and do not always feel the need to start using their savings right away. You are allowed to keep money in your pre-tax retirement accounts until age 70 ½. At that age, you are forced by IRS regulations to slowly withdraw some money each year. This is called your **Required Minimum Distribution or RMD**. If you are getting close to this age, it is best to check with your financial advisor so that they can help you determine what your RMD will be each year.

#### Which Pre-tax Retirement Plan is Right for You:

There are so many different Pre-tax plans and the main differences among them are your employment status and contribution limits. Here is a breakdown of each of the various pre-tax retirement plans:

**401K** – this is the most common form of pre-tax savings, this is a plan that is sponsored by for-profit employers and allows you to defer money from your paycheck and place it in a variety of investments. There are also certain extra incentives that employers may give, such as a matching clause in which the employer of your plan agrees, up to a certain percentage, to match the money that you choose to invest. It is important to note that it is at the sole discretion of the employer whether they wish to match your contributions or not. When they do match, there are often certain restrictions as to how much they match and if you leave the company you may forfeit some of what they match. You will not forfeit what you contribute.

**403B** – this is almost identical to the 401K except that it is sponsored by non-profit employers. So if you are an employee of a non-profit firm, you will have a 403B instead of a 401K.

**SEP & Simple IRA** – Either of these two IRAs are usually for people that work for a small business or are self-employed. The contribution

limits for these accounts depend on a number of variables and are something that you must consult your employer about. If you are self-employed, or have consulting work outside your regular job, you need to speak to whomever helped establish your plan or an investment planner.

**Traditional IRA** – This is a way to save for retirement that is not through an employer. This gives you the opportunity to save \$4000 a year. The amount is \$4,500 if you are 50 or older for 2005 and \$5000 for 2006. You may then be able to deduct this money from your current adjusted gross income (AGI). Please note that if you contribute money to another pre-tax plan, you may not be able to deduct your traditional IRA contributions from your income for the year. The big benefit in a traditional IRA is that you have few restrictions on your investment decisions. While most employer plans restrict the investments available to you, Traditional IRA's are not designed with such constraints. In fact, it is usually best to consolidate your retirement holdings. As soon as you leave a job, you are eligible to do an IRA Rollover. Rollovers allow you to consolidate your assets from your other pre-tax retirement accounts and combine them without taxes or penalties into a traditional IRA without major product or investment restrictions.

## Summary of Post-tax Plans:

There is one main type of post-tax plan and it is called a **Roth IRA**. This type of plan was first introduced in 1998 and is still relatively new. You are not able to roll any assets from a pre-tax plan into a Roth IRA. Post-tax plans are very different from pre-tax plans for a variety of reasons. The first and most obvious is the way these plans are funded. Post-tax plans are funded once all taxes have been taken out. So now that you have paid taxes on the contribution amount up front, what is the incentive to save this way? The main benefit for post-tax retirement accounts is that since you have already paid the taxes, if you wait to withdraw money from the account until you reach the magical age of 59 ½, anything you take out of the account is **tax free!** This is a tremendous advantage, especially if you start investing early.



Post-tax plans give you the flexibility to take out a large amount of money all at once and it will not raise your tax bracket. Since the taxes have been paid already, there are no required minimum distributions (RMD) that need to be taken.

So what are the downsides to having a post-tax plan? The first is that not everyone is eligible to participate. You are only able to have a post-tax plan if you earn less than \$95,000 a year and are single or if you and your spouse filing jointly, make less than \$150,000 a year combined. The other downside is that there are penalties for taking money out early. If you take money out early from a post-tax plan, you may have to pay income taxes on any profit you have made and then also pay a 10% penalty. This penalty is similar to the pre-tax plan penalty.

### Now that I have a basic understanding of things, where do I start?

Now that you understand your retirement options, you can begin the process of making an informed decision about how and where to save your money. Regardless of what your tax bracket is, always take full advantage of your company's matching provision in your employer-sponsored plan (if available). A matching provision in a company's pre-tax plan is essentially your company giving you free money as incentive to save. It is a wonderful incentive that needs to be taken advantage of fully. Once you have done that, then the decisions start to depend on your individual situation.

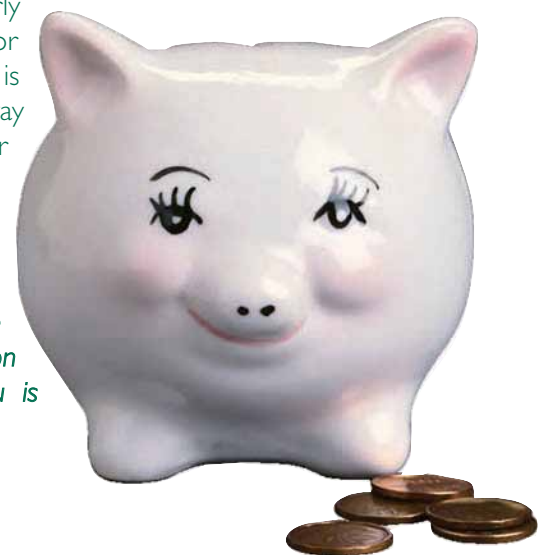
If you fall within the income limits for the post-tax plan (Roth IRA) you need to focus on putting away the maximum amount into this plan. It is \$4,000 a year (\$4,500 if you are 50 or older) for 2005. Once you have taken full advantage of your employer's matching account and maximized your Roth IRA, it is time to examine the rest of your life goals and plan accordingly.

If you are above the income limit for the Roth, look to maximize your contributions to your company's pre-tax plan. You will be in a high tax bracket so this may help lighten the burden on you. The maximum amount that you are usually able to contribute to most company plans ranges from \$14,000 to \$18,000 (if you are 50 or older) in

2005. You will want to check with your employer to find out your particular limits. Once you have maximized your savings in this area, it is time to examine other life goals and best determine where else your money needs to work for you.

You are able to contribute to a retirement savings plan if you do not have earned income, but your spouse is earning an income. Each situation there can be different and it is best to ask for professional help.

No matter what your situation is, the best advice is **start saving immediately!** Being practical and properly saving for retirement is the best way to empower yourself so you do not have to depend on others. *The best person to help you is yourself!*



**Aaron Brachman is an investment executive with Ferris, Baker Watts, Inc. FBW is one of the largest regional brokerage firms in the mid-Atlantic region. Aaron has been working in wealth management for over 6 years and for the last 3 years, has taught a weekly class that covers different topics in basic finance. Aaron can be reached at either 202-661-9569 or 800-227-0308 ext 9569 and via email at: [abrachman@fbw.com](mailto:abrachman@fbw.com).**

**Ferris, Baker Watts, Inc. Member, NYSE, SPIC, Washington DC. The information presented here is from sources that we believe are reliable but we do not guarantee its completeness or accuracy. ■**

**Arizona Alpha, The University of Arizona**

James E. Henry '58

**California Beta, Stanford**

John M. Huneke '48

**California Delta, University  
of Southern California**

Britton D. McConnell '44

**California Epsilon, UCLA**

Robert M. McIntyre '48

**California Eta, California Polytechnic State**

Dale E. Jackson '66

**California Lambda, San Diego State**

Adrian Hans Laudermilk '96

**Indiana Alpha, DePauw**

Jason Mathias Schneider '95

**Indiana Beta, Indiana**

Richard D. Hansen '48

**Iowa Beta, Iowa State**

George A. Rosenfeld '24

Alan V. Wind '48

**Louisiana Alpha, Louisiana State**

Almon G. Kirkwood Jr. '71

**Maryland Alpha, Johns Hopkins**

William Bond Truitt '50

**Mississippi Alpha, University of Mississippi**

Earl Michael Hennen Jr. '78

**Missouri Alpha, University of Missouri**

Robert J. Hyde '52

James A. Laws '55

Kenneth D. Puckett '55

Ronald V. Raine '56

**Nebraska Alpha, University of Nebraska**

Lynn J. Judy '39

Richard D. Regier '49

**New Hampshire Alpha, Dartmouth**

John S. Robinson '40

**New York Epsilon, Colgate**

Warren W. Tuttle '46

**Ohio Alpha, Ohio Wesleyan**

William A. Spiker '31

**Ohio Delta, The Ohio State University**

David F. Clark '35

**Ohio Epsilon, Case Western Reserve**

Jack R. Kullman '43

**Ohio Theta, Ashland**

Joseph H. Woodruff '66

**Oregon Alpha, Oregon**

Donald C. Marsters '36

**Pennsylvania Kappa, Swarthmore**

Robert C. Turner '33

Edward H. Roberts '35

Doddridge R. Young '48

**Pennsylvania Lambda, Penn State**

Donald P. Sanders '34

**Tennessee Delta, Vanderbilt**

Emmett C. Kaericher Jr. '47

**Virginia Beta, Washington & Lee**

Robert W. Knudsen '48

James R. Moffatt '50

Peter Nowick Jr. '66

Randy H. Lee '69

**Washington Alpha, University of Washington**

Robert T. Hulbush '38

Ramsay H. Sandelin '43

**Wisconsin Gamma, Beloit**

Frederic M. Bowers '33

John G. Cummings '54





### JOHN G. CUMMINGS

John G. Cummings passed away on May 13, 2005, in Plano, Texas, following a brave fight with cancer. The husband of Carolyn Dunlavy Cummings, John was born in Mendota, LaSalle County, Ill., on July 1, 1935, to parents Harold and Nell Cummings. Following graduation in 1957 from the University of Illinois, he was proud of his service in the U.S. Army. During his lifelong career in the insurance business, he and his family lived in Atlanta, Chicato, Houston and, most recently, Richardson, Texas (Dallas area).

Survivors are his wife, Carolyn; two sons, John and Kent; and two daughters, Linda and Laura.



### RICHARD D. HANSEN

Richard D. Hansen, 76, a flight surgeon and Brigadier General who served in the United States Air Force for 30 years, died July 7th, 2005, at Patriot's Colony Convalescent Center, Va.

Gen. Hansen was born in Bedford, Ind., but moved to Bloomington, Ind., as a child. He received a Bachelor of Science degree, cum laude, from Indiana University in 1951, a doctor of medicine degree from the Indiana University School of Medicine in 1954, and a master of public health degree, cum laude, from the Harvard University School of Public Health in 1958.

After entering the Air Force as a first lieutenant in June 1954, Gen. Hansen completed an internship at Letterman Army Hospital in San Francisco in July 1955. A residency in Aerospace Medicine was completed after study and service at the School of Aerospace Medicine, Brooks Air Force Base, Texas, Wright Patterson Air Force Base, Ohio, and Minot Air Force Base, N.D.

Gen. Hansen also served at The Air Force Academy, Colo., with the Military Advisory Assistance Group in Taipei, Taiwan, as Hospital Commander at Luke Air Force Base, Ariz., and as the Director of Education at The School of Aerospace Medicine. Prior to his last assignment as the U.S. Forces in Europe Command Surgeon General, he served as the Tactical Air Command Surgeon General and the Air Force Military Personnel Surgeon General.

Gen. Hansen took an active part in the United States Space Program, serving first as a medical controller on the tracking ship positioned in the Indian Ocean, then at Cape Canaveral, Fla., and as medical flight controller in Corpus Christi, Texas, for the Mercury first manned orbital flight.

While assigned to Tan Son Nhut Air Base, Republic of Vietnam, he flew more than 70 combat missions and

was the last Air Force physician to leave Vietnam at the end of the war in March 1973.

Gen. Hansen was a member of Alpha Omega Alpha, diplomate of the American Board of Preventive Medicine in Aerospace Medicine, a past president of the USAF Flight Surgeons, a past president and fellow of the Aerospace Medical Association, and author of a number of professional publications in the field of Aerospace Medicine.

Gen. Hansen held a private pilot's rating for both single engine planes and gliders. He had more than 2,500 flying hours, including 400 in single engine jet aircraft. His military decorations and awards include the Air Force Distinguished Service Medal, Legion of Merit with three oak leaf clusters, Meritorious Service Medal, Air Force Commendation Medal, Presidential Unit Citation Emblem, Air Force Outstanding Unit Award Ribbon with "V" device and four oak leaf clusters, as well as several awards from the Republic of Vietnam including the Air Service Medal and the Gallantry Cross.

After retiring from the Air Force in 1984, Gen. Hansen attended the College of William and Mary taking Fine Arts classes. He then held the position of Medical Director at the NASA Langley Clinic until 1998.

He is survived by his wife of 52 years, Vy Meyer Hansen; a stepmother; two sons, J. Mark Hansen and Col. Richard D. Hansen, Jr.; a daughter, Heidi Hansen McCrory; two daughter-in-laws; a son-in-law; and six grandchildren.

### EARL MICHAEL HENNEN, JR.

Earl Michael Hennen, Jr., 46, died Aug. 16, 2005, at his home in Jackson, Miss. Earl Michael Hennen, Jr., was born April 7, 1959, and graduated from Murrah High School in Jackson. Following graduation from the University of Mississippi in 1981, he worked at the Mississippi Museum of Natural Science from 1980-1981 before beginning his archival career at the Mississippi Department of Archives and History in May 1981. Mr. Hennen served for five years as an archivist with the records of state government, before being appointed in 1985 as Curator of Manuscripts, which position he held at the time of his death. During his tenure as Curator of Manuscripts, Hennen was instrumental in acquiring and processing for the state historical collections, including the Judith Sargent Murray Papers and the Medger and Myrlie Evers Collection. He was an active member of the Society of Mississippi Archivists, having served on its board of directors and as its president, and of the Mississippi Historical Society. In 1989 his significant experience and contributions were recognized by receiving archival certification from the American Academy of Certified Archivists. Further recognition of his archival work came in 1991 when Hennen was invited to be a member of the Archival Technology Delegation to the People's Republic of China.

Mr. Hennen was a communicant of St. Richard Catholic Church and an avid antique collector. He is preceded in death by his mother, Mary Virginia Roberts Hennen.

Survivors include: father, Earl Michael Hennen, Sr.; brother, Lt. Colonel William L. Hennen; sister, Lynne Blalock; four nieces and many friends and colleagues.

### **ALMON GERARD KIRKWOOD, JR.**

Almon Gerard "Jerry" Kirkwood, Jr., age 53, died on Wed., July 27, 2005 at his residence in Metairie, La. Jerry graduated from De La Salle High School and graduated with a BS in Business Administration from Louisiana State University. Jerry joined Kirkwood Company in 1975. The company was founded in 1958 by his father. Jerry assumed the role of President of Kirkwood Company in 1985. Within a few years, Kirkwood Company had grown into one of the largest and most prominent suppliers of pumps and process equipment to the industrial marketplace in Louisiana, Mississippi and Alabama. In 1986, he also became one of the founders and a member of the Board of Directors of Slurry Dynamics International, a manufacturer and supplier of mechanical pump seals. Jerry was a member of Phi Kappa Psi Fraternity, Saint Paul's Episcopal School Dad's Club, Knights of Babylon, Metairie Country Club, and Society of Pulp and Paper Administrators. He was a former member of the Petroleum Club, Vista Shores Country Club, the Saint Paul's Episcopal School Parents' Committee, Krewe of Bacchus, and the Plimsoll Club. Beloved husband of Catherine Faust Kirkwood, loving father of Christopher Almon Kirkwood, Caitlin Lee Kirkwood, Jason Gerard Kirkwood, and Matthew Coulter Kirkwood. Son of Rose Marie Crucia Kirkwood and of the late Almon Gerard Kirkwood, Sr. He is also survived by 12 nieces and nephews.



### **JACK R. KULLMAN**

Jack R. Kullman, 80, of Norwalk, Ohio, died July 7, 2005 at his residence following a courageous battle with cancer.

He was born May 24, 1925, in Cleveland and had lived in Norwalk since 1959. He earned his bachelors degree in mechanical engineering from Case School of Applied Science and served in the Naval Reserve during World War II. He retired after 37 years with Clevite Corporation, where he was an engineering manager.

He was a member of the First United Methodist Church of Norwalk, Phi Kappa Psi Fraternity and the Shakespeare Club, served on the board of Fisher Titus Medical Center for 20 years, was an Eagle Scout and had been active with the Boy Scouts of America. He enjoyed collecting antiques and fishing.

He is survived by his wife, Dorothy (McCave) Kullman, whom he married April 10, 1948; sons and daughters-in-law Jack R. Jr. and Debt Kullman, and Scott R. and Shar: a daughter and son-in-law, Janet A. Adams and Andy; nine grandchildren, five great-grandchildren and numerous nieces and nephews.

He was preceded in death by his parents, George and Myrtle (Siehl) Kullman; a brother, Roger "Bud" Kullman; and his first grandson. Brad Allen Kullman.

### **ADRIAN LOUDERMILK**

Producer-manager Adrian Loudermilk died July 23, 2005 from injuries sustained in a San Diego County traffic accident in which he was a passenger. He was 30.

Loudermilk was the head of Los Angeles-based Venture Management. He had broken into show business at the Writers and Artists Agency, then worked for AMG and Bondesen-Graup as a manager before setting up his own banner in 2004.

Loudermilk, a native of Nepal, had grown up in Southern California and attended San Diego State University, where he was an editor of the school newspaper.

He's survived by his parents, Hans Loudermilk and Kim Priestly; two sisters; and two brothers.



### **BRITTON DREW MCCONNELL**

Britton Drew McConnell, 78, of Palm Desert, Calif., died on July 26, 2005.

He was born March 30, 1927, in Los Angeles, Calif. to Francis Britton McConnell and Vevay Matheson.

He served in the Navy in World War II, and was stationed at Great Lakes Naval Training Center.

He graduated from USC in 1948. While at USC he joined Phi Kappa Psi. In 1951, he graduated from Loyola School of Law and was admitted to the California Bar.

He formed his own law firm in 1951 with offices in Los Angeles, San Fernando Valley and Orange County, specializing in workers' compensation law and corporate law.

He served as a participant in the Los Angeles Municipal Court Judge Pro Tem Program, and was Chairman Elect of the Executive Committee on Workers' Compensation for the Los Angeles County Bar Association. He also was a member of the National Panel of the American Arbitration Association and served as past president of the Compensation Insurance Attorney's Association.

Drew was an avid golfer and joined both the Wilshire Country Club and the Los Angeles Country Club. In 1981, he met and married Vicki Shill.

They retired to Palm Desert in 1994 and joined Indian Ridge Country Club. Drew became a member



of the Gate and Patrol Committee, and served on the Indian Ridge Board of Directors.

While in the desert, he participated in the Riverside County Mediation Program.

He is survived by his loving wife, Vicki; two daughters, Karen and Katie; and two granddaughters. In 1997, his daughter, Kelly, preceded him in death.



### **KENNETH D. PUCKETT**

(obituary originally appeared in the Columbia Daily Tribune, by Kevin Coleman)

Dale Puckett, a longtime clothier and relentless supporter of downtown Columbia, Mo. died June 12, 2005. He was 68. The family declined to release the cause of death.

Over the years, Dale Puckett worked to improve the downtown business district, was a co-founder of CrimeStoppers and served on numerous boards and committees during his more than 40 years of community service.

Friends and associates described Puckett, the owner of men's and women's clothing stores on Broadway, as a sharp businessman who remained committed to downtown even during difficult times.

City Manager Ray Beck, who came to Columbia in 1960 as a staff member in the city's Public Works Department, said Puckett's community legacy will be his support and improvement of the central business district, especially after shopping malls began to sprout and threaten the retailing vitality of downtown.

"You have to hand it to him; he stayed 'downtown' and got strong during times of ups and downs," Beck said. "When Penney's moved out and banks were trying to decide whether to stay downtown, there were a lot of concerns."

Puckett was a founder in 1968 of Metropolitan Improvement Co., a group of downtown business owners that created the concrete canopy over Broadway shops. An ardent supporter of the controversial structure, Puckett made news earlier this year when he agreed the canopy had served its purpose and should come down.

In 1985, Puckett applied for a one-year appointment to the Columbia City Council when John Westlund resigned as mayor and Third Ward Councilman Rodney Smith replaced him. A deadlocked city council filled the seat by putting the candidates' names in a hat. They drew Ed Kaiser's name.

CrimeStoppers handed out its first reward for a police tip in 1982, and Puckett privately paid many more rewards over the years. He also served as a volunteer deputy sheriff.

"We've lost a friend to law enforcement," Columbia Police Chief Randy Boehm said this morning. Puckett

was a member of the screening committee, appointed by the mayor; that recommended Boehm as chief.

"He was always the liaison with the police department for crime prevention and issues in the downtown area," Boehm said.

Tribune General Manager Jack Waters, who worked with Puckett on downtown improvement projects as a member of the city's Special Business District board, described Puckett's community involvement as "significant and tireless."

"He was a very committed gentleman who was concerned about Columbia and the quality of life here," Waters said. "He was always involved. He's going to be missed."

Puckett graduated from the University of Missouri-Columbia with a degree in business and served as an officer in the U.S. Army. He later returned to Columbia to join the men's clothing business his father, Ken, founded in 1946. He married Vicki Rapp in 1980, and she survives.

Puckett, who held black belts in tae kwon do and judo, enjoyed historic car restoration and boating at the Lake of the Ozarks.



### **RAMSAY HJALMAR SANDELIN**

Ramsay Hjalmar Sandelin was born in 1923 in San Francisco, Calif. to parents Mabel Hicks Sandelin of Prince Edward Island, Canada, and Evert Hjalmar Sandelin of Stockholm, Sweden.

Mabel and Evert had met in Honolulu. Mabel worked there as a secretary for Castle and Cooke, and Evert was with the Matson Navigation Co., where he served as Engineer on the USS Wilhelmina and the SS Maui, and as Captain of the passenger liner Lurline in 1924.

When he was four years old, Ramsay's mother brought him back to live in Honolulu. Ramsay grew up in Waikiki where many of his days were spent surfing. While Ramsay was growing up his mother worked in the Public Welfare Office. Two of her bosses were eventual mayors Johnny Wilson and Neal Blaisdell. Ramsay grew up an only child, but he has a large family in Sweden.

He started school at Jefferson elementary in Waikiki, later attended Punahou and graduated from Roosevelt High School in 1941. He then attended the University of Washington in Seattle. His education was interrupted by World War II when he served in the Army. After the war, he returned to the University of Washington and graduated in 1948. Returning to Honolulu, Ramsey began his thirty-seven year career with the then Bishop Bank. He retired as a vice president with First Hawaiian Bank.

Ramsay and Marian met while working at Bishop Bank and were married in 1950. They started married life living on Pacific Heights, and in over 50 years of living in Honolulu, moved from Wailupe Peninsula, to Portlock, to Kalani Iki. They have two children, Victoria (Vicki) Reisner, and Ramsay Jr. (Sandy), who both live in Honolulu.

## JASON MATHIAS SCHNEIDER

Jason Mathias Schneider Age 29, of Carmel, died Monday, July 18, 2005. He was born Nov. 6, 1975 in Indianapolis, Ind. Jason was married on Sept. 22, 2001, to Leigh A. Sappenfield, who survives. He was a National Business Development Manager for Stryker Corporation, Navigation Division. Jason was a 1998 graduate of DePauw University, where he was a Management Fellow and a member of Phi Kappa Psi Fraternity. Jason is also survived by his parents, James J. and Karen A. Schneider of Carmel and his brothers. ■

## staff directory

Phi Kappa Psi Fraternity is governed by elected and appointed officers who serve as volunteers. The Fraternity's daily affairs are administered by its professional staff. The Endowment Fund of the Phi Kappa Psi Fraternity and The Permanent Fund of the Phi Kappa Psi Fraternity are each administered by a board of volunteer trustees.

The Fraternity Headquarters and Museum is located at 510 Lockerbie Street, Indianapolis, Indiana 46202 and may be reached by telephone at (317) 632-1852, by fax at (317) 637-1898, or by E-mail at [pkp-hq@PhiKappaPsi.com](mailto:pkp-hq@PhiKappaPsi.com). The Fraternity's web site is <http://www.PhiKappaPsi.com>.

### executive council

President	James R. Blazer
Vice President	Stephen R. O'Rourke
Treasurer	Stuart W. Rhodes
Secretary	Tryon Hubbard
District I Archon	William J. Hochberg
District II Archon	Bartholomew W. Connolly
District III Archon	Peter J. Richmond
District IV Archon	James A. Murtha
District V Archon	J. Kyle Jackson
District VI Archon	Kurt J. Hartman

### headquarters staff

Executive Director	Shawn M. Collinsworth
Assistant Executive Director	Claude M. Warren III
Director of Chapter Services	Chad M. Stegemiller
Director of Alumni Services	Mark O. Solomon
Director of Leadership Development	Shane N. Yates
Director of Publications	RJ Proie
Director of Expansion	Alec G. Traub
System Administrator	William M. Spotts
Bookkeeper	Jacklyn H. Cole
Administrative Assistant	Christina A. Silas
Educational Leadership Consultants	Micah S. Kleid, Jonathan M. Moxey
	Ronald K. Ransom, Scott C. Sutton
Executive Director Emeritus	Ralph D. Daniell

### endowment fund

Trustees	John F. Buck (2006), Donald V. Fites (2006), James E. Hagler (2004), John D. Klinedinst (2006), Henry B. Marvin (2004), D. Bruce McMahan (2004), Matthew C. Michelson (2004), Jerry Nelson (2008), A. Scott Noble (2008), Richard E. Ong (2006), Dennis J. Schwartz (2008), Wayne W. Wilson (2008), Paul R. Wineman (2008)
Director of Development	Tom C. Pennington
Assistant Director of Development	Ben S. Nicol

### permanent fund

Trustees	Fred H. Clay Jr. (2006)
	John R. Donnell Jr. (2010), Thomas P. Rogers (2008)

### appointed officers

Attorney General	James L. Miller
Mystagogue	Kent C. Owen
Sergeant-at-Arms	Bruce Tavares
Chaplain Dr. John E. Kmentos Jr.	
Surgeon General	Dr. William J. Blanke
Director of Housing Corporations	Shannon E. Price
Coordinator of Chapter Advisors	James R. Trigilio
Director of Strategic Planning	Paul J. Oblon
Director of Internet Technologies	Rob A. Ulaszek
PKP Speakers Program	Ben Bowman
Historian Emeritus	J. Duncan Campbell
Historian	Michael H. McCoy
Coordinator of Philanthropic Events	W. Todd Salen
Director of Alumni Associations	David McDonald
Coordinator of Music Education	Travis H. Nagler
Director of Membership	James D. Boyle
Director of Hyparchos Network	Mark Wong
NIC Representative	Thomas D. Meisner Sr.
FRMT Representative	Steven E. Nieslawski
Curator of Antiquities	Dr. Robert W. Mouser
Director of Extension	Tim R. O'Neil
Director of Host Institutions	Kyle F. Jordan
Director of Faculty Advisors	Steve A. McLelland
Coordinator of Womens Events	Janie Keller
Coordinator of Special Events	Chris M. Hammer
Coordinator of Accreditation	Rob J. Parada Jr.

### new orleans gac committee

Lee C. Reid, Shannon E. Price, Brian K. Madacsi, Durwood L. Keller, Bill E. Cruikshank, Ben W. Cade, David S. Moyer, Greg C. Knapp (Honorary)



## Alumni Clubs & Associations

### Atlanta Alumni Association

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### Baltimore Alumni Association

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www.baltimorehipsi.org

### Baton Rouge Alumni Association

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### Birmingham Alumni Association

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### Bluegrass Alumni Association

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### Central Texas Alumni Association

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### Houston Alumni Association

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### New Orleans Alumni Association

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### Rhode Island Alumni Association

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### Rocky Mountain Alumni Association

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### Rubber City Alumni Association

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### Western New York Alumni Association

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### Wheat State Alumni Association

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### Wisconsin Alumni Association

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An upcoming issue of *the Shield* will be spotlighting Phi Psis who have served America in the Armed Forces. If you or a Phi Psi you know has a military story to share, please contact us at [rjp@phikappapsi.com](mailto:rjp@phikappapsi.com).

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**Colorado Alpha - University of Colorado** 1131 University Ave., Boulder, CO 80302  
Chapter Advisor: Advisor Needed

**District of Columbia Alpha - George Washington University** 607G 23rd NW Apt. 201, Washington, DC 20052  
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