



# PHI GAMMA DELTA

BUILDING COURAGEOUS LEADERS

## Mandatory Forms & Fees

The following information is intended to aid Chapter/Provisional Chapter Treasurers with budgeting. Contact Director of Membership & Operations [Amy Watson](#) with questions at 859-255-1848.

### Fees & Penalties

#### Annual Membership Dues:

**\$115.00 per initiated brother.** An e-mail invoice will be issued in late September. There is no exemption or reduction for fifth-year seniors. (The deadline for roster updates is **Friday, September 15, 2023.**)

#### Joining Fee: (Applies to Early Adopter Chapters ONLY)

**\$275 per initiated brother.** All newly initiated brothers must register at [www.phigam.org/NewBrotherRegistration](http://www.phigam.org/NewBrotherRegistration) and will be asked to pay the joining fee at the end. A 10% late penalty is assessed for initiates reported and/or fees paid more than 30 days after initiation.

#### New Member Fee: (Formerly known as pledge fee)

**\$75.00 per new member.** New members must register at [www.phigam.org/NewMemberReg](http://www.phigam.org/NewMemberReg), and the new member fee must be paid at that time. A 10% late penalty is assessed for new members reported and/or fees paid more than 15 days after pledging.

#### Initiation Fee:

**\$210 per new initiate.** Initiations must be reported through the [Fraternity's website](#). Initiation fees should be collected from individuals prior to their initiation and paid to the International Headquarters with a single chapter check or online payment. A 10% late penalty is assessed for initiates reported and/or fees paid more than 30 days after initiation.

#### First Year Dues:

**\$57.50 per new initiate.** This amount should be added to the initiation fee.

#### Liability Insurance:

**This amount varies annually.** Invoices will be emailed in January. The charge per member is dependent upon annual renewal rates determined by the insurance carrier; please budget **\$250 per man**. There is no exemption or reduction for fifth-year seniors. (The roster update deadline is **Friday, January 12, 2024.**)

#### Finance Charge:

A **1% charge** is assessed monthly on all amounts owed to the Fraternity that are more than 60 days past due.

#### End of Year Penalty:

A **10% charge** is assessed on all amounts owed to the Fraternity that are 60 days past due on June 30.

#### Payment Methods:

- Mail a check to P.O. Box 4599, Lexington, KY 40544-4599
- Pay with a credit or card at [www.phigam.org/chapterpayment](http://www.phigam.org/chapterpayment).

- ACH payment transfer: ABA 083000137 ACCT 732099551
- Wire transfer: ABA 021 000 021 ACCT 732099551
- Zelle payment application. Use [awatson@phigam.org](mailto:awatson@phigam.org) to locate account.

## Other Fees & Assessments

### Academy Registration Fees:

Budget **\$1,500/year**. An email invoice will be issued to each chapter/provisional chapter for the registration fees in October.

### Ekklesia Registration Fees:

Budget **\$1,500** for registration + cost of lodging biennially (the next Ekklesia is in 2024). An email invoice will be issued to each chapter/provisional chapter for the registration fees in April.

## Other Member Reporting Forms

### Report of Affiliation:

The [Report of Affiliation form](#) should only be used when an initiated brother transfers schools and joins the local undergraduate chapter - [www.phigam.org/AffiliationForm](http://www.phigam.org/AffiliationForm).

### Graduate Initiation:

The [Graduate Initiation form](#) should only be used when an undergraduate chapter initiates a graduate or faculty member within the criteria set within the bylaws of the Fraternity - [www.phigam.org/file/GraduateInitiationForm.pdf](http://www.phigam.org/file/GraduateInitiationForm.pdf).

## Financial Forms & Reports

### Annual Budget:

The Bylaws of the Fraternity require that each undergraduate chapter adopt at the beginning of each collegiate year, a budget for that year specifying the authorized expenditures for the purposes of the chapter. It is recommended that the chapter's budget is developed with assistance from its advisors (Purple Legionnaire and/or Board of Chapter Advisors) and shared with the officers and chapter.

### Financial Reporting:

The Bylaws of the Fraternity require that the Chapter Treasurer report to his chapter each month during the collegiate year a financial statement of the chapter and at the expiration of his term of office, and more often as required, report the financial condition and transactions of the chapter.

### Annual Financial Review:

The Bylaws of the Fraternity require that each undergraduate chapter shall cause its financial records to be audited by a competent accountant or to be subjected to a competent independent outside financial review at least once in each collegiate year.

### IRS Form 990:

[IRS Form 990](#) is due on 15th day of the 5th month after the chapter's/provisional chapter's accounting period ends (*typically November 15*) - [www.file990.org/](http://www.file990.org/).