

**ERIC B. MORSON**  
**306 Dundee Road**  
**Stamford, CT 06903-3612**  
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**Eric@kkpsi.org**

January 1, 2021

Kappa Kappa Psi  
2021 National Committee on Nominations

**Letter of Intent**

Dear Brothers,

With honor and humility, I offer myself as a candidate for re-election to the Kappa Kappa Psi Board of Trustees.

My professional expertise in taxation, investments, financial planning, and balanced risk management, my experience as an elected City legislator and Representative, and my history of dedicated service as a Brother of our Fraternity, firmly qualifies me to help guide the future of Kappa Kappa Psi. Serving for the last 8 years as a Trustee has well prepared me for re-election to a third term and, if re-elected, am prepared to serve as Board Chair for the 2021-23 biennium.

This biennium was hardly what anyone expected. We were forced to simultaneously navigate a global pandemic with the fear and devastating loss that accompanied it, a severe economic crisis, political upheaval, and social unrest. As Brothers, we lost the physical connection to each other as campuses closed, band programs halted, in-person conventions moved to virtual, and experiences never fulfilled continued to mount. We witnessed Black Lives Matter move to the forefront of American social consciousness and have only scratched the surface of this subject as it relates to the fabric of our fraternity. This fundamental work must continue in perpetuity, ensuring that voices are heard, people are engaged, perspectives are understood, and actions are taken. I remain committed to this work and will engage with Brothers across the country on the immediacy of addressing these issues and how we move forward together.

Kappa Kappa Psi completed the largest capital campaign in our history this biennium, with great success. An integral part of the campaign was designed to teach us what we need to know and how to expand so as we cultivate our "culture of giving" it will guide and shape future initiatives. Questions of personnel, specialized staffing, and skills required all need to be addressed, and the OMRS replacement must be customizable and flexible for the role it will play. We need to ensure that our successors understand that development and capital vision are vital to our path forward.

I believe it is time to embark on crafting a longer strategic vision for the corporation. We successfully completed a great number of the goals from our last strategic plan, and as things have evolved during the last few years it has become clear to me that a renewed overall set of purposes should be embraced. Rather than simply moving from one initiative to another, let our work be guided by this set of shared principles and goals. Will our initiatives try to fit into our vision, or will the vision craft and influence what we do?

However, our major focus next biennium is support. As we eventually emerge from COVID-19 academic and social lockdown, the landscape will certainly have changed. Music programs will have vanished, as will have some schools entirely. Our Active membership will need the kind of affirmation and support we have not seen in the modern era, and the National Council in turn must have every ounce of support the Board of Trustees can provide as they navigate a path to normalcy and stability.

I satisfy the basic qualifications of a candidate as outlined in our constitution. I am 52 years old and have a B.A. in Marketing & Economics from The University of Connecticut (1990), a 4-year degree. I am willing and able to devote the necessary time to this position as working from home affords me great schedule flexibility. I have few restrictions on the number of professional days off available each year and have additional time during the work week to devote as needed. I am fully capable of representing the Fraternity under all ordinary conditions and have demonstrated that ability over 34 years of fraternal commitment. I will be at our National Convention in Grand Rapids. As my contributions are best suited to the role of Trustee and currently serve as Vice-Chair, I will not accept a nomination to any other elected office but remain truly humbled by any consideration.

As for outstanding business and professional ability, I am in my 28th year of practice as a Financial Advisor with Equitable Advisors LLC, having remained with the same firm for my whole career (1993). I hold 15 state insurance licenses, 7 FINRA registrations, and 5 Investment Advisory Representative (IAR) state registrations. My multi-million dollar book of business includes assets under individual management and designed strategies, insurance & annuity portfolios, disability, and qualified retirement programs. My client focus is always based on long term strategic planning, implementation, and timely follow-up. Integrating investment strategy, tax disciplines, and risk management is the hallmark of the kind of planning that my career and reputation are built upon.

I founded Family Tax Advantage LLC with my father in 2002. Our tax practice continues to grow, and we are proud of our 93%+ client retention rate. Our client base resides in nearly all 50 states and 19 foreign countries, with its greatest concentrations in the New York Metro, Connecticut, and Greater Phoenix areas.

My professional approach in both practices is always based on client relationships. Having always believed that enduring relationships based on trust are the foundation of success, I practice the same philosophy in my work as a member of our Board of Trustees.

In 2017 I was elected to the City of Stamford Board of Representatives (City Council) representing the 13<sup>th</sup> District, where I serve as Vice-Chair of the Public Safety & Health Committee and serve on the Fiscal, Communications, and Code of Ethics Revision Committees. I also serve as the Board of Representatives appointed member of the Stamford EMS Board of Directors, as a member of Stamford CERT, and am a Justice of the Peace.

I was initiated at the Delta Omicron chapter at UConn in April, 1987. Serving as chapter VP of Service, we won the A. Frank Martin NED Top Chapter Award. While VP of Membership, the chapter size doubled to 63, and while President hosted the 1990 NED Convention. I am a proud member of the NEDAA since 1990 and served as Secretary/Treasurer. I have advised National and District committees on nominations, programs, finance, ways & means, awards, and alumni affairs numerous times. I have presented workshops on conflict resolution, alumni, new graduate financial responsibilities, debt & asset management, financial planning, ritual performance, ritual history, Second Degree, committee effectiveness, and others. I am a Charter Member of KKPsiAA & TBSAA, and a Life Member of both Kappa Kappa Psi (1990) and Tau Beta Sigma (2009).

I currently serve as Vice Chair of the Board of Trustees, and previously served as Board Secretary, KKPsiAA Board Liaison, on the Board Finance Committee, led the Joint National Audit Committee, and led the effort to design and implement a 401(k) plan for our Headquarters Staff. In my service as Vice-Chair of the AA-BOD I am proud to have led the creation of the Alumni Giving Program (AGP) and created The Scott Stowell Alumni Excellence Award. In one of the great honors of my life, I was awarded the A. Frank Martin Award for Fraternity Service in 2014.

I have attended District and National Conventions for more than 30 years, including every National Convention since 1991, District Conventions in all 6 districts, including all 32 NED conventions since 1989. COVID-19 permitting, I will attend the NED, SWD, WD, & MWD conventions in 2021, where I hope my commitment to teaching the lessons of our Ritual and how they guide and impact our lives makes an emotional impact on the quality of our Brotherhood.

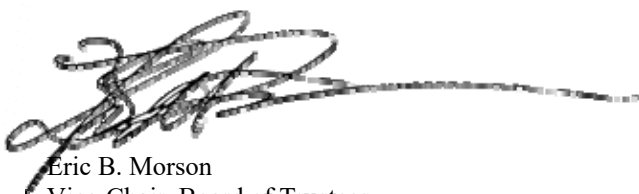
In addition to fraternal service, I coordinated the UConn Alumni Pep Band Program from 1997-2013, assembling all-alumni pep bands and additional participation at home games for both the men's and women's UConn basketball teams in Hartford & Storrs, CT, and serve as Vice-Chair of the UCAMB Board of Directors.

I spent seven years volunteering as a drill instructor and brass tech for the Stamford High School Marching Band from 1995-2001. This leadership and teaching opportunity greatly influenced my life for the positive impact I was able to make on students' confidence, leadership abilities, and musicality. I watched the band grow from 4 members to over 100 and become a competitive program. Many of the students I taught went on to become college bandmembers, band directors, and members of Kappa Kappa Psi & Tau Beta Sigma.

My successful professional disciplines and experience will continue to bring considerable value to the Board of Trustees. As the global economy attempts to settle into a post-COVID-19 world and new political alignments form, and we must strive to grow and solidify our financial foundation in this new environment, my contributions of insight and perspective are at your service. I remain open, supportive, and connected to our leadership and active members, believing that committed, transparent, and ethical conduct are basic expectations.

Thank you for considering my candidacy, and I look forward to the honor of continued service as one of our Trustees.

Very truly yours,



Eric B. Morson  
Vice-Chair, Board of Trustees

Kappa Kappa Psi – Life Member, Delta Omicron, University of Connecticut  
Tau Beta Sigma – Life Member, Gamma Kappa (Honorary), University of Connecticut  
KKPsi NED, SED, WD, National Chapter, Kappa Upsilon, & Nu Omicron Honorary  
TBS NED & Gamma Kappa Honorary



# Kappa Kappa Psi National Honorary Band Fraternity 2021-2025

## *Candidate for Board of Trustees*

**ERIC B. MORSON**



With honor and humility, I offer myself as a candidate for re-election to the Board of Trustees for the 2021-25 term. I believe that the strong long term outlook our Brotherhood is so proud of is due in part to the professional diversity of the Board, and sustaining that diversity is vital to our strategic planning. My professional expertise in taxation, investments, financial planning, and balanced risk management, my experience as an elected City legislator and Representative, and my history of dedicated service as a Brother of our Fraternity, firmly qualifies me to help guide the future of Kappa Kappa Psi. Serving for the last 8 years as a Trustee has well prepared me for re-election to a third term and, if re-elected, am prepared to serve as Board Chair for the 2021-23 biennium. I am excited about the opportunity to continue serving you for another term.

While the National Council's work focuses largely on the present state of our organization, the Board of Trustees keeps a bird's eye view of the Fraternity in focus, while envisioning a path to the future. As part of a pro-active, strategic thinking Board of Trustees, I am excited to continue helping manage the fraternity corporation from a position of strength and respect, so essential to the enduring service we provide. Ensuring our financial strength allows us to take on new initiatives, be ready when unexpected opportunities appear, and confidently meet every challenge in our pursuit of serving college bands.

This biennium was hardly what anyone expected. We were forced to simultaneously navigate a global pandemic with the fear and devastating loss that accompanied it, a severe economic crisis, political upheaval, and social unrest. As Brothers, we lost the physical connection to each other as campuses closed, band programs halted, in-person conventions moved to virtual, and experiences never fulfilled continued to mount. We witnessed Black Lives Matter move to the forefront of American social consciousness and have only scratched the surface of this subject as it relates to the fabric of our fraternity. This fundamental work must continue in perpetuity, ensuring that voices are heard, people are engaged, perspectives are understood, and actions are taken. I remain committed to this work and will engage with Brothers across the country on the immediacy of addressing these issues and how we move forward together.

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I believe it is time to embark on crafting a longer strategic vision for the corporation. We successfully completed a great number of the goals from our last strategic plan, and as things have evolved during the last few years it has become clear to me that a renewed overall set of purposes should be embraced. Rather than simply moving from one initiative to another, let our work be guided by this set of shared principles and goals. Will our initiatives try to fit into our vision, or will the vision craft and influence what we do?

However, our major focus next biennium is support. As we eventually emerge from COVID-19 academic and social lockdown, the landscape will certainly have changed. Music programs will have vanished, as will have some schools entirely. Our Active membership will need the kind of affirmation and support we have not seen in the modern era, and the National Council in turn must have every ounce of support the Board of Trustees can provide as they navigate a path to normalcy and stability.

Having been part of your National Leadership Team for the past 10 years and a Trustee for the past eight, I'm as confident as ever that my vision for financially sound, broad reaching, and enriching support of the college band movement with Kappa Kappa Psi as the leader deserves all of

our best efforts. With every role, office held, workshop given, and conversation shared, my commitment to positive change is steadfast.

It is clear to me that being part of a dynamic National Leadership Team is more than just being the most effective leader I can be. With the position comes the responsibility to teach, mentor, and instill qualities of leadership into every member of our Order that I can. I have always tried to lead by example, and part of that is to inspire others to be stronger leaders than they are today, guide them along their path, pick them up when they fall, and celebrate their successes. Active and Alumni alike, all have my ear and my passion.

Being deeply committed to ensuring that our Actives have the most enriching and exciting experiences they can, I stay connected by visiting chapters and attending every convention possible, offering interactive Ritual workshops that teach how our history and sacred words not only craft our lives, but give us a clear path forward. By developing and conducting workshops on conflict resolution, diversity, interpersonal skills development, alumni affairs, credit management, and financial issues for new graduates, I always look for opportunities to reach out in ways that my professional background and experience best serves our Fraternity.

Thirty-four years of Brotherhood have given me a deep appreciation of our history and committed dedication to Kappa Kappa Psi's future. My leadership style is personal, always seeking to bring perspectives together, and finding common ground in challenging situations. My financial background strengthens our ability to effectively manage our investments, allowing us to aim higher as we set our goals and benchmarks. As past Finance Chair and Vice Chair of the AA-BOD, I am proud to have led the effort creating the Alumni Giving Program (AGP), create the Scott Stowell Alumni Excellence Award, and help establish a strong financial framework for our AA. In all our endeavors, we strive for the transparency and ethics our Brotherhood embraces.

I am now in my 29<sup>th</sup> year of practice as a Financial Advisor with Equitable Advisors LLC. Holding licenses in 15 states, my book of business includes millions of dollars of assets under individual and active management, insurance & annuity portfolios, disability, education, and qualified retirement programs. My focus has always been on long term strategic planning, implementation, and effective follow-up. Integrating investment strategy and risk management is a hallmark of the kind of planning that my career and reputation are built upon.

My father and I co-founded Family Tax Advantage, LLC in 2002. Our tax practice continues to grow year after year, with enthusiastic clients who support an annual retention rate better than 93%. Our client base covers more than 40 states and 19 foreign countries, with the greatest concentrations in the New York Metro, Connecticut, and Greater Phoenix areas.

My professional approach has always been based on building long-term relationships with clients, never "making sales". I have always believed that enduring, trusted relationships best serve my clients' ultimate goals, and know this philosophy is the cornerstone of the success I enjoy in my professional practices. This is what I will continue to bring to the Board of Trustees.

While passionate about my views, I am always open-minded, and my professional disciplines and experience bring elements of considerable value to the Board of Trustees. I am eager to continue contributing my insight and perspective, and pledge to remain open, supportive, connected, and accessible, while always building personal connections with our members.

Brotherhood has given so much to me and my family, and the opportunity to continue serving you in our National Leadership is as exciting to me as ever. My commitment to our mission, values, and our people forever remains. I thank you for considering my candidacy and look forward to serving and strengthening our Brotherhood for another term as a Trustee.

*Eric B. Morson is in his 29<sup>th</sup> year as a Financial Advisor with Equitable Advisors LLC, & an Investment Advisory Representative registered in AZ, CT, MA, NJ, and NY. He holds Series 63, 65, 6, 7, & 24 FINRA Licenses, FINRA Registrations in AZ, CA, CT, MA, NH, NJ, & NY, and is insurance licensed in 15 states. Eric founded Family Tax Advantage, LLC with his father in 2002, and is a Tax Advisor in the CT office. He was elected to the City of Stamford Board of Representatives (City Council) from the 13<sup>th</sup> District in 2017. As a Representative, he serves as Vice-Chair of the Public Safety & Health Committee, as a member of the Fiscal Committee, and the Code of Ethics Revision Committee. Eric serves on the Board of Directors of Stamford Emergency Medical Services (SEMS). He is a past President (2007-10, 13-15) and VP (2011-13) of the Saw Mill Association in Stamford, CT, and was President of the Gazebo on Hope Association (1998-2005). He founded and runs Easy-E Productions D.J. & Karaoke since 1993, and enjoys his passion for vocal performance several nights a week.*

*Eric is the current Vice-Chair of the KKPsi Board of Trustees, having served on the Finance Committee, as Board Secretary, and Alumni Liaison to the AA-BOD. He was honored with the A. Frank Martin Award for Fraternity Service in 2014. Eric previously served as both National Vice-Chair and Finance Chair of the KKPsi Alumni Association Board of Directors, two biennia on the former NAA Board of Directors (1999-2003) and as its National Membership Chair (2001-03). He is a Charter Member of KKPsiAA, TBSAA, and the former NAA. Eric was initiated into the Delta Omicron chapter at the University of Connecticut in April, 1987, and played trumpet in "The Pride of Connecticut," the UConn Marching Band & Pep Band (1986-1990). As an active member he served as VP of Service the year his chapter won the A. Frank Martin NED Top Chapter Award, and while VP of Membership the chapter size doubled to 63. While President, they hosted the 1990 NED Convention. Eric is a member of the NEDAA (1990-present) and served as Secretary/Treasurer. He has advised Nominations, Programs, Finance, Ways & Means (National & District), Awards, National Convention Site, and Alumni Affairs committees and more over the years. Eric is a Life Member of KKPsi and TBS, an Honorary member of the NED, SED, WD, National Chapter, Kappa Upsilon, and Nu Omicron Chapters of KKPsi and of the NED and Gamma Kappa Chapter of TBS. He has attended all 16 National Conventions since 1991, 32 consecutive NED conventions since 1989, and a total of 67 conventions overall.*

*Eric graduated from The University of Connecticut in 1990 with a B.A. in Marketing & Economics. He has been continuously active in the UConn Alumni Marching Band (UCAMB), and coordinated the UConn Alumni Pep Band Program from 1997-2013. He served on the UCAMB Reorganization Committee, and is now the Vice-Chair of the UCAMB Board of Directors. Eric volunteered as a Drill Instructor and Brass Tech for the Stamford H.S. Marching Band (1995-2001), when the band grew from 4 members to over 100 and became a competitive program. Many of his students became college bandmembers, band directors, and members of Kappa Kappa Psi & Tau Beta Sigma.*

*Eric and Michele (also a Brother) have been married for 23 years, and live in Stamford, CT with their 2 children, Cameron (19) and Callie (15), who both play the trumpet, just like their dad.*

# ERIC B. MORSON

## Candidate for Kappa Kappa Psi Board of Trustees

306 Dundee Road  
Stamford, CT 06903-3612

Eric @ KKPsi.org

Home: (203) 322-3258  
Cell: (203) 249-8000

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### Memberships:

- KKΨ Life Member #3284: ΔO Chapter, University of Connecticut, Storrs, CT (Initiated April, 1987)
- TBΣ Life Member #2709
- KKΨ-AA Charter Member, TBΣ-AA Charter Member (Diamond Anniversary Member), NEDAA (1990-Present)

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### Awards & Honors:

- A. Frank Martin Award, *Fraternity Service* (2014)
- KKΨ Honorary: NED, SED, WD, National Chapter, Nu Omicron, Kappa Upsilon
- TBΣ Honorary: NED & Gamma Kappa

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### Convention Participation (\*67):

- National Conventions (16 consecutive): 1991 - 2021
- North Central District Convention (3): 1995, 2017
- Midwest District Convention (3): 1994, 2015
- Southeast District Convention (5): 2013, 2015, 2017-18
- \*Attended all 6 Virtual District Conventions In 2020
- Northeast District Conventions (32 consecutive): 1989-2019
- District Parliamentarian, 1992
- Chair, First NED Awards Committee, 1990
- Southwest District Convention (6): 2009, 2014, 2016-17, 2019
- Western District Convention (4): 2012, 2018-19

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### Fraternal Leadership & Management Experience:

- KKΨ Board of Trustees (2013-Present):
  - Board Vice-Chair (2019-21)
  - Board Liaison to KKΨAA-Board of Directors (2017-19)
  - Re-Elected (2017)
  - Board Secretary (2013-17)
  - Board Finance Committee (2013-17)
  - Led Joint KKΨ/TBΣ National Audit Committee
  - Led the effort to design and establish National Headquarters Staff 401(k) retirement plan (*Implemented, 2016*)
  - Developed procedure for KKΨAA-Board of Directors & TBΣAA-Executive Council to obtain and track IRS Tax Identification Numbers (EIN) for Local Alumni Associations
  - Strategic Planning Initiative
  - National Ways & Means Committee Advisor (2015)
  - Colony Advisor:
    - Nu Omicron: University of New Haven, *West Haven, CT*
  - Chapter Installation Officer:
    - Alpha Alpha: University of Nevada - Reno, *Reno, NV*
    - Nu Theta: Northeastern University, *Boston, MA*
    - Nu Omicron: University of New Haven, *West Haven, CT*
- Workshops Presented:
  - Ritual: I Second That Emotion (Interactive), Lessons of The Ritual, Pearls Of Performance, Ritual Performance & Presentation
  - Financial: Dollars & Sense, 2-3-4 Financial Concepts, Personal & Chapter Finances
  - Chapter: Being an Effective Committee Member
- KKΨ Alumni Association:
  - National Vice-Chair, Board of Directors (2012-13)
  - National Finance Chair (2011-13)
  - Alumni Advisory Committee (2011-12)
  - Led the creation and launch of the Alumni Giving Program (AGP)
  - Created The Scott Stowell Alumni Excellence Award
  - Advanced the elevation of the Alumni Advisory Committee to AA-Board of Directors
- National Alumni Association, Charter Member (1995-07):
  - National Membership Chair (2001-03), Board of Directors (1999-03)
- Northeast District Alumni Association:
  - Secretary/Treasurer (1994-95)
  - Chapter Installation Team: Iota Eta, Waynesburg College, *Waynesburg, PA*
- Delta Omicron Chapter:
  - First recipient of the William Dick Founder's Award (2005)
  - Chapter Installation Team: Theta Xi, Southern CT State University, *New Haven, CT*
  - President (1989-90): NED Convention Host Chapter, Alternate Delegate
  - VP of Membership (1988-89): Founded Scholarship & Award Programs, Chapter doubled to 63
  - VP of Service (1987-88): Winner, Northeast District A. Frank Martin Top Chapter Award

**Professional Experience:**

- Manage high net worth financial portfolios & investment accounts
- Design & oversee strategic financial, education, & retirement plans
- Design & maintain multi-million dollar life insurance, disability insurance, and annuity programs
- Create & manage custom business protection and estate plans
- Tax Advisory Services & Preparation of personal, partnership, & business tax returns
- Advise small businesses and self-employed people on effective tax planning and financial structure
- Advise clients on issues of federal, state, and estate tax planning, proper tracking methods, & debt management

**Professional Credentials:**

- Financial Advisor  
Equitable Advisors, LLC (1993-Present) - *Stamford, CT*
- Investment Advisory Representative (IAR)  
Registered In AZ, CT, MA, NJ, & NY
- FINRA Registrations  
Series 63, 65, 6, 7, & 24
- FINRA State Securities Appointments (7)  
AZ, CA, CT, MA, NH, NJ, & NY
- Co-Founder & Tax Advisor  
Family Tax Advantage, LLC (2002-Present) - *Stamford, CT & Sun Lakes, AZ*  
500+ Clients throughout the U.S. and 19 foreign countries
- Insurance Broker  
Equitable, MONY, Prudential, MetLife, Principal, Guardian, Lincoln National
- State Insurance Licenses (15)  
AZ, CA, CT, MA, MD, MO, NH, NJ, NY, OH, PA, SC, TX, & VA
- Founder & DJ/KJ  
Easy-E Productions DJ & Karaoke Services (1993-Present) - *NY Metro, CT, & Southern New England*

**Band Activities:**

- University of Connecticut Alumni Band (UCAMB)  
Vice Chair, Board of Directors (2013-Present)  
Reorganization Committee (2007-13)  
Alumni Pep Band Coordinator (1997-2013)
- University of Connecticut Alumni Marching & Pep Bands (1990-Present)
- Stamford H.S. Marching Band, Stamford, CT  
Drill & Brass Instructor (1995-2001)
- University of Connecticut Marching Band Trumpet (1986-90)
- University of Connecticut Pep Band (1986-90)
- Stamford H.S. Marching Band, Stamford, CT (1982-86)

**Civic & Personal Activities:**

- City of Stamford Board of Representatives (City Council)  
Representative, 13<sup>th</sup> District (Elected 2017)  
Vice-Chair, Public Safety & Health Committee -- Member, Fiscal Committee & Code of Ethics Revision Committee
- Stamford Emergency Medical Services (SEMS)  
Board of Directors (2017-Present)
- Stamford Democratic City Committee  
Representative, 13<sup>th</sup> District (2014-18)  
Elected 2014 & 2016
- Justice of The Peace: State of Connecticut (2017-Present)
- Young Artists Philharmonic ([youngartistsphil.org](http://youngartistsphil.org))  
Board of Directors (2016-17)
- Temple Sinai, Stamford, CT  
Education Committee (2009-10)
- Saw Mill Association, Inc.  
Board Member (2006, 2016-20)  
President (2007-10, 2013-15), Vice President (2011-13)  
Public Works Chair & City of Stamford Liaison (2006-07, 10-11)
- Gazebo on Hope Association, Inc.  
President (1998-2005)
- Motorcycle Enthusiast:  
1986 Yamaha Fazer FZX700

**Education:** B.A. Marketing/Economics, University of Connecticut, *Storrs, CT* (1990)

**Family:** Married 23 years to Michele -- 2 children: Cameron (19) & Callie (15), both trumpet players



**MISSISSIPPI STATE**  
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January 4, 2021

Dear Brothers of Kappa Kappa Psi:

This year, you are being asked to evaluate candidates for office that many of you may not have met personally because of our inability to gather in person over the past year. Because of that, I hope you will see the value in relying on evaluations of these brothers written by people who know them well, so that you can make an informed decision about your vote. It is my pleasure to write this letter of recommendation on behalf of Eric Morson as he seeks re-election to the Kappa Kappa Psi Board of Trustees. I have had the pleasure of knowing Eric for several years through the fraternity, and I think he is an excellent candidate for re-election.

Eric contributes a wealth of knowledge to the Board from his background in the finance industry. It is important for the Board as a whole to have strengths in several areas, and in the areas of long-term planning and development, having an expert in finance is critical as the Board makes decisions for the future of the fraternity. According to our national constitution, members of the Board of Trustees should possess "outstanding business or professional ability" and should "be capable of representing the...Fraternity under all conditions." Eric's background in business/finance alone makes him a strong candidate for re-election; however, it is far from his only strength.

Eric was one of the first people I met when I came on board as a governor, and I knew right away that this was a person who loved Kappa Kappa Psi deeply. His commitment to the organization was evident as our discussions often centered around things that would strengthen the fraternity. His vast knowledge of our organization is difficult to match, and having a detailed understanding of the way the fraternity operates is critical to the success of any Board of Trustees member and the Board as a whole.

I have always been impressed with Eric's genuine care and concern for the current brothers of Kappa Kappa Psi. I cannot stress to you enough the importance of this quality. It would be easy for someone in his position to lead from a distance, working with the Board on matters of significance without necessarily getting to know the current generation of brothers. Eric is not that way at all. I have personally witnessed him engaging with brothers and talking with them as if he had known them for years, mentoring them into hopefully having experiences in Kappa Kappa Psi similar to his own. This is demonstrated by his consistent attendance at numerous fraternity events

across the country over the years. He leads from the front, not the back. This type of behavior cannot be manufactured; it can only be genuine. Eric Morson not only cares for the past of Kappa Kappa Psi, he cares deeply for the present and future of the organization as well.

Eric's letter of intent and resume further outline his stellar record of service to Kappa Kappa Psi and illustrate in greater detail his strengths as a candidate for re-election to the Board of Trustees. I urge you to read his materials carefully. I am honored to recommend Eric Morson for re-election to the Kappa Kappa Psi Board of Trustees without reservation, and I urge you to give him highest consideration for your vote.

AEA!

A handwritten signature in black ink that reads "Craig Aarhus". The signature is written in a cursive, flowing style with a large initial "C".

Craig Aarhus, D.M.A.  
Associate Director of Bands  
Southeast District Governor



Michael Bradford-Calhoun  
8 Manilla Circle  
Hampton, VA 23669  
[M.Bradcalh@gmail.com](mailto:M.Bradcalh@gmail.com)

January 10, 2021

To the Brotherhood,

Brother Eric Morson has repeatedly proven himself to be a brother of outstanding character and an ethical leader. For this reason, I write this letter of recommendation in support of his election to the Kappa Kapp Psi Board of Trustees. I have known Eric as a friend and mentor since my election as President of the Southeast District (SED) Council of Kappa Kappa Psi. Brother Morson was the first person to reach out to me and offer his assistance. On several occasions I have reached out to Eric for professional guidance and he is willing to provide wise counsel every time. Eric has always demonstrated the genuine spirit of fraternal brotherhood and our organization benefits from his involvement.

Brother Morson has also demonstrated his leadership in his local community by serving as an elected member on the City of Stamford Board of Representatives where he serves as Vice Chair of the Public Safety and Health Committee. Outside of his professional and community accolades Eric just a good brother. Over the course of this uncertain pandemic and during the turbulent political unrest, Bro. Morson and I engaged in a candid conversation about race relations within our organization and the nation. It is refreshing to know that there are brothers who recognize that ethical, strategic leadership is still needed in our fraternity. Even when we disagree, Eric is always respectful and understanding. Eric and I have maintained a great fraternal relationship and I consider him an absolute asset to this organization. Without reservation I recommend Eric Morson be elected to the Kappa Kappa Psi Board of Trustees

Forever Striving,

Bro. Michael Bradford-Calhoun aka MBC  
Alumni, Iota Zeta Chapter of Kappa Kappa Psi  
President, Southeast District (2016-2017)



OFFICE OF THE ATTORNEY GENERAL  
CONNECTICUT

WILLIAM TONG  
ATTORNEY GENERAL

January 14, 2021

**Via Email**

Kappa Kappa Psi  
National Committee on Nominations

Re: *Letter of Recommendation in support of Eric Morson*

Dear Nominations Committee:

It brings me great pleasure to submit this letter of recommendation on behalf of Eric Morson. Since 2006, I have had the privilege of knowing Eric through his tireless and meaningful involvement in his community, and in his hometown, the City of Stamford. During this time, I have seen Eric's leadership and professional skills applied effectively as he has served the people of his community and his city.

As his State Representative at the time, I worked with Eric while he served as Public Works Chair, two years as Vice President, and five years as President of the Saw Mill Association. The nearly 500 people that live in Saw Mill enjoy an improved quality of life due to Eric's administration and continued involvement. He led his neighborhood's fight against the state electric utility to reduce the frequency and duration of power outages, the response time to begin repairs, and exploration of alternate solutions. He was able to establish personal relationships with executives at CL&P/Eversource that have proven effective for all the families that entrusted him as their President. These are a few of the reasons I was happy Eric agreed to serve as Treasurer for my 2014 State Representative reelection campaign.

It was no surprise to me when Eric expanded his civic engagement. He was elected to the Stamford Democratic City Committee in 2014 and 2016, after which he was nominated to run for the City of Stamford's Board of Representatives (City Council) in 2017. He won his election and has been an effective legislator and representative of his constituents. As a member of the Fiscal Committee and the Code of Ethics Revision Committee, Eric's professional background and dedication to honest and transparent government have made a positive impact on the city. Finally, as Vice-Chair of the Public Safety & Health Committee, Eric co-sponsored and helped pass an ordinance to ban ghost guns and 3-D printed firearms from the City (PS30.032, Ord 1256). He also co-sponsored an ordinance banning single-use plastic bags (LR30.019, Ord 1243).

165 Capitol Avenue  
Hartford, Connecticut 06106

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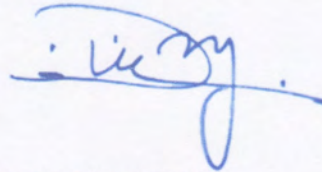
I have the highest confidence in Eric's leadership, and am deeply impressed by his commitment to service. His tireless professional representation and diligence has earned the respect of many in Stamford's government, including our Mayor and State Delegation in Hartford.

Eric always plans strategically and has a real talent for bringing opposing views to points of understanding. He is well respected and supported by his organization. I enjoy working with Eric whenever we have the opportunity. I am proud to call Eric my friend and share in the excitement he has for his candidacy.

In Eric you have a person of leadership, financial, and personal skills that has already benefited Kappa Kappa Psi and he will continue to make a great impact in the future. I recommend Eric Morson for your Board of Trustees enthusiastically and without reservation.

Thank you in advance for your consideration. Should you have any questions about Eric's qualifications, please do not hesitate to contact my office.

Very truly yours,

A handwritten signature in blue ink, appearing to read "William Tong", with a stylized flourish extending from the end of the name.

WILLIAM TONG



**EQUITABLE**  
ADVISORS

**Susan P. Wood**

Regional Program Manager  
Northeast and West Regions

January 6, 2021

Kappa Kappa Psi  
National Honorary Band Fraternity  
Nominations Committee

Dear Committee Members:

I have had the pleasure of knowing and working with Eric Morson for a little shy of 29 years in my capacity as the Long Island Branch Marketing Director. Without reservation I can attest to the fact that Eric holds himself to the highest standards as a Financial Advisor, always trying to do what's best for his clients. Just maintaining a thriving practice for this extended period of time is a testament to his business acumen and how much his clients value his expertise and level of customer support. By founding his tax firm with his father in 2002, Eric has successfully morphed his business into a full-service tax and financial services practice.

If you look at what's important in evaluating a person Eric comes up as a leader on all fronts. As noted above, he is a respected contributor in his profession, an outstanding citizen, and a dedicated father and husband to his family. Eric is extremely professional in all his dealings inside and outside of the company, efficiently and effectively handles all issues brought to his attention and treats everyone with respect and dignity. I always believe that a person's children are a reflection of their parents and Eric and his wife have raised two very fine children who are well grounded and admired.

Filling board positions is a difficult task. You need to make sure that the person you add to the team will complement the skill sets you already have but more importantly, that the person you add to the board is dedicated to the board's mission and will work tirelessly on behalf of the board to champion its causes. As you've seen for the last four years, Eric has shown you the dedication he has to Kappa Kappa Psi and his desire to contribute in any way that he can to the betterment of the fraternity and its members.

I hope I am just confirming what you already know and have experienced first-hand by having Eric as a Trustee and that you will recommend him for re-election to another term.

Sincerely,

*Susan P. Wood*

Susan P. Wood

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