

GIPS Newsletter - August 2012

### **New Q&As Released**

Three new Q&As have been added to the [GIPS Q&A database](#) providing additional guidance on Verification and Performance Examinations. The new Q&As can be found by searching the Q&A database by performing a search for the categories “Verification” and “Performance Examinations” for entries updated on or after July 2012.

### **The GIPS Standards Annual Conference - Space is Still Available**

The [GIPS Standards Annual Conference](#) is scheduled for 20-21 September 2012 in Boston. Please note that the date has been changed from October as previously announced. Last year’s conference sold out and space is limited, so register early.

The GIPS Standards Annual Conference is the only conference of its kind focused on the implementation and application of the GIPS standards. Subject matter experts share best practices and speak to the key issues and major developments in performance measurement, making this conference essential for any performance or compliance professional. Gain a general understanding of investment performance standards and measurement tactics, learn about recent or proposed changes to the GIPS standards, understand how to ensure that your firm maintains compliance, and meet other performance specialists from around the world.

### **Upcoming Workshops**

A [GIPS Standards Interactive Workshop](#) is scheduled for 19 September 2012 in Boston. The workshop will help participants master the requirements of the GIPS standards, including composite construction, performance calculation, and the creation of a compliant presentation. For complete details, please visit the [CFA Institute website](#).

The [Fundamentals of Performance Measurement and Attribution Workshop](#) is also scheduled for 19 September 2012 in Boston and will provide skills immediately useful in your work and will offer a thorough understanding of the fundamentals of performance measurement with practical lessons for beginners and experienced analysts alike. Following a highly interactive small-group format, participants will be guided through a wide range of frequently used attribution, risk, and benchmark-analysis methods and reinforce them with live calculation exercises.

### **New Staff Appointment**

We are pleased to announce that Annie Lo, CFA, CIPM, CAIA has accepted a position with CFA Institute as Director, Global Investment Performance Standards. In this new role, she will be leading CFA Institute’s GIPS-related activities in the Asia Pacific region. She will manage relationships with country sponsors, manage volunteers in the region, conduct outreach to stakeholder groups, serve as a spokesperson, and oversee regional and technical committees and working groups.

Most recently, Annie was Senior Manager, Senior Performance and Risk Analyst for Charles Schwab in San Francisco, CA where she led and implemented the initiative to help the firm become GIPS compliant and verified. Over the years, Annie has significantly contributed as a volunteer to the GIPS

standards and other CFA Institute initiatives.

**Staying Current**

Stay up to date by [signing up](#) for the GIPS Standards Newsletter and by following us on [Twitter](#). Please visit the [GIPS standards website](#) for additional information and resources, including [webcasts](#) and [podcasts](#) from past GIPS standards conferences.

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