

GIPS Executive Committee Open Conference Call

The GIPS® Executive Committee has scheduled an [open conference call](#) for **Wednesday, 11 February 2015 from 8:00 to 8:30 a.m. US Eastern Standards Time (EST)** to provide an update on GIPS Technical Committee activities, the new Firm Notification Requirement, and GIPS Strategic Plan. If you would like to attend this call as an observer, please [view the materials and dial-in instructions](#) for the upcoming GIPS Executive Committee open conference call.

GIPS Compliance Notification Form Now Available

In 2014, the GIPS Executive Committee approved the new requirement that firms claiming compliance with the GIPS standards must notify CFA Institute of such claim. The requirement is effective 1 January 2015 and firms will have until 30 June 2015 to submit the notification form which is now available on the [GIPS website](#).

The firm notification form collects only limited information: name of firm, address, contact information, and verification status, while providing more extensive data (e.g., firm type, assets under management, asset classes managed, and investment vehicles offered) is optional for firms. Firm-specific information will be kept confidential; however, summary information or statistics from the database may be released publicly. For additional information, please contact gipscompliance@cfainstitute.org.

GIPS Webinar

We are offering a [FREE GIPS Standards webinar](#) on **Wednesday, 25 February 2015 at 12:00 p.m. US EST** that will summarize and explain the newest [Guidance Statement on the Application of the GIPS Standards to Asset Owners](#). This free webinar will be interactive where CFA Institute staff will provide participants with important GIPS guidance as well as the opportunity to ask questions.

The 60-minute session will include:

- Background information about how Asset Owners can comply with the GIPS standards,
- Explanation of challenging issues for asset owners claiming compliance,
- Details about important new guidance, and
- An opportunity for open discussion on the Guidance Statement.

Click [here](#) to register.

Error Correction Survey

In July 2014, CFA Institute conducted a short survey regarding GIPS compliant firms' error correction policies and procedures to inform the investment management industry as to how firms develop and administer their GIPS standards compliance programs with respect to such policies and procedures. The results of the survey were first unveiled at the 2014 GIPS Annual Conference in Boston. A detailed report of the survey results is now available on the [GIPS website](#). Also, check out the [blog](#) just released on Error Correction highlighting key points from survey results and best practices on error correction.

New GIPS Logo for Firms

Firms claiming compliance with the GIPS standards may now use the new GIPS logo on compliant presentations or advertisements that adhere to the GIPS Advertising Guidelines. To find out how your firm can use the logo and view the usage guidelines, visit the [GIPS website](#).

GIPS Annual Conference and Workshops

The [GIPS Standards Annual Conference](#) is scheduled for **Thursday and Friday, 17-18 September 2015 in San Diego, California**. 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.

A [GIPS Standards Interactive Workshop](#) is scheduled for **Wednesday, 16 September 2015 in San Diego, California**. The workshop will help participants master the requirements of the GIPS standards, including composite construction, performance calculation, and the creation of a compliant presentation.

The [Fundamentals of Performance Measurement and Attribution Workshop](#) is also scheduled for **Wednesday, 16 September 2015 in San Diego, California** and will provide skills immediately useful in your work and 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.

Staying Current

Stay up to date by following us on [Twitter](#). Please visit the [GIPS website](#) for additional information and resources, including webcasts on various topics and podcasts from past GIPS standards annual conferences. Curious to know what is being said about the GIPS standards? Check out the GIPS standards' website for the [GIPS in the News](#) section which features related news articles.

© 2015 CFA Institute. All rights reserved.
915 East High Street, Charlottesville, VA 22902

[Contact Us](#) • [Manage Your Account](#) • [Unsubscribe](#)