

UPDATE REPORT ON Intellectual Property Working Group as of 25 October 2006

Committee Objectives

The Intellectual Property Working Group was created to consider:

- The intellectual property agreements reached at the GIPS Summit, with the specific task of reviewing the revised Country Sponsor Agreement;
- Proposals for ownership and proper usage of the GIPS standards and interpretations;
- Proposals for GIPS branding.

Membership

Jeannie Anderson – Chair, *CFA Institute*
Fanny Sergent (in place of Laurent Fedrigo) – *Luxembourg*
Catherine Jasserand – *France*
Beth Kaiser – *Americas*
Dr. Peter G. König – *Germany*
Naoko Mori – *Japan*
Trevor Persaud – *United Kingdom*
David D. Spaulding – *Americas*

Trudy Via – Providing administrative support, *CFA Institute*

Review of Status

The Working Group has held eight conference calls since May 2006. The group has conducted an extensive amount of discussion and drafting on the Country Sponsor Agreement. The Working Group presented an exposure draft of the revised Country Sponsor Agreement to the GIPS Executive Committee for its review. The Working Group incorporated the EC feedback into its CSA draft. The CSA was tentatively approved by the Working Group at its 20 October 2006 meeting.

Next Steps

- The next conference call is scheduled for early November 2006. The group will discuss all the individual comments and suggested changes to the *Adoption Guidelines and Process* document.
- The Working Group will propose a final version of the Country Sponsor Agreement and any other recommendations and proposals for GIPS Council review and to the Executive Committee for approval.
- The group may then discuss proposals for ownership of the GIPS brands.