

GIPS® TRADEMARK USAGE

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GIPS® is a registered trademark owned by CFA Institute. The following provides guidance for the proper use of the GIPS trademark.

The first time “GIPS” is used in a document, please use the complete name and the registered trademark, as follows: Global Investment Performance Standards (GIPS®).

GIPS Standards Sponsors, entities that claim compliance with the GIPS standards, software providers, verifiers, consultants, and any others that use the GIPS trademark must follow the trademark protection rules outlined below.

The GIPS® Trademark

“GIPS” must be used as an adjective. The following “friend” words may be used in conjunction with “GIPS” without “standards”:

GIPS Advertisement
GIPS Advertising Guidelines
GIPS Asset Owner Report
GIPS Compliance
GIPS Compliant
GIPS Composite Report
GIPS Handbook
GIPS Pooled Fund Report
GIPS Report
GIPS Valuation

All other uses of or references to “GIPS” must state “GIPS standards...” For example:

GIPS standards analyst
GIPS standards policy manual

How to Use the GIPS® Trademark

Do:

- Use the ® symbol (i.e., GIPS®) in the first and most prominent use of “GIPS” in a document, on a webpage, etc.
- Use “GIPS” as an adjective and only with the acceptable “friend” words.
- Whenever a product, service, website, report, advertisement, RFP, exhibit banner, etc. contains “GIPS” or GIPS standards as a descriptor of its products and/or services, in association with the GIPS standards, include the following disclaimer: “GIPS® is a registered trademark owned by CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.” For text material, this disclaimer must appear on each page where “GIPS” is used. For websites, this disclaimer must appear at the bottom of each web page where “GIPS” is used.
- For all other uses of “GIPS”, include the disclaimer: “GIPS® is a registered trademark owned by CFA Institute”. For text material, this disclaimer must appear on each page where “GIPS” is used. For websites, this disclaimer must appear at the bottom of each web page where “GIPS” is used.

Do not:

- Modify or change the trademark.
- Incorporate “GIPS” in a business name or product name.
- Incorporate “GIPS” in a hashtag.
- Use “GIPS” or the GIPS standards in the plural or possessive.

Questions?

Please direct questions regarding proper use of the trademark to gips@cfainstitute.org.