

GIPS Annual Conference and Workshops

The [GIPS® Standards Annual Conference](#) is scheduled for Thursday and Friday, 17-18 September 2015 in San Diego, California US. 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 techniques, learn about recent and/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.

Last chance to register early! Save \$200 USD by registering for the GIPS Standards Annual Conference by Tuesday, 18 August 2015.

A [GIPS Standards Interactive Workshop](#) is scheduled for Wednesday, 16 September 2015 in San Diego. 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 and will provide skills immediately useful in your work and offers 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.

GIPS Executive Committee Open Conference Call

The GIPS Executive Committee has scheduled an open conference call for **Wednesday, 26 August 2015 from 8:00 to 8:30 a.m. US Eastern Time to provide updates.** If you would like to attend this call as an observer, please [view the materials and dial-instructions](#) for the upcoming GIPS Executive Committee open conference call.

New Appointments to GIPS Executive Committee and GIPS Technical Committee

CFA Institute announces the appointment of new members to the Global Investment Performance Standards (GIPS®) Executive Committee, the decision-making body for the GIPS standards and the GIPS Technical Committee, responsible for technical oversight of the GIPS standards.

GIPS Executive Committee

Gabriele Montalbetti, CFA, CIPM, Director, External Fund Research and Fund of Funds Management Consultinvest, SGR with over 20 years in the investment industry, has been appointed as an at-large member of the GIPS Executive Committee beginning 1 September 2015. Mr. Montalbetti has been a CFA Institute volunteer since 2002 and is a member of the CFA Society Italy. He is a past board member and president of the CFA Society Italy. Mr. Montalbetti has served on GIPS Process Working Group and the GIPS Italy Country Sponsor Committee. He was involved in the development of the CIPM certification and is a past member of the CIPM Advisory Council. Mr. Montalbetti regularly gives presentations to the network of financial advisors affiliated to his employer where he illustrates the methodology and results of the firm's fund selection process and peer group analysis of the different funds where the firm invests. He is a fellow member of the Global Association

of Risk Professionals (GARP) and a member of the Professional Risk Managers International Association (PRMIA).

Thomas "Arin" Stancil, CFA, CIPM, Managing Director/Principal, Guardian Performance Solutions, LLC with 15 years in the investment performance industry, has been appointed as an at-large member of the GIPS Executive Committee beginning 1 September 2015. For the past fifteen years, he has been involved with the GIPS standards first as a verifier, then as a practitioner inside an investment adviser applying the Standards, and now as a consultant. Mr. Stancil is a past member of the GIPS United States Investment Performance Committee. He is a member of the CFA Society of Sacramento and Seattle, the GIPS Pooled Fund Advisory Team and the CIPM Association. Mr. Stancil was published, in Practical Compliance and Risk Management for the Securities Industry (Zavenelli Case) in December 2014, the article is entitled, SEC Enforcement of GIPS Compliance: A Closer Look. He co-authored, Performance Evaluation: Rate-of-Return Measurement, first published 2013 for the CIPM curriculum. Mr. Stancil was instrumental in the development of two white papers published on the GIPS standards website – Best Practices for Creating and Maintaining Policies and Procedures for Complying with the Global Investment Performance Standards (GIPS®) and Performance Advertising and Reconciling the GIPS® Standards with the Investment Advisers Act of 1940. He has been a speaker at the GIPS Standards Annual Conference in 2012 and Summit for Performance Risk & Attribution (SUPRA) in 2014.

GIPS Technical Committee

Wylie Tollette, CFA, Chief Operating Investment Officer, CalPERS (California Public Employees Retirement System) with over 20 years in the performance measurement industry, has been appointed as the next chair of the GIPS Asset Owner Subcommittee and member of the GIPS Technical Committee beginning 1 September 2015. Mr. Tollette is implementing compliance with the GIPS standards at CalPERS and implemented compliance with the GIPS standards at Franklin; Franklin Portfolio Advisors, Franklin Templeton Real Estate Portfolio Advisors, and updated Templeton and Templeton's Private Equity Program's claim of compliance. He is a past member of the GIPS Risk Working Group and is a member of the CFA Society Sacramento. Mr. Tollette has published several articles on risk statistics and performance reporting (e.g., Journal of Performance Measurement, The Art and Science of Risk Management: A Case Study; and Franklin Templeton, Taking Rational, not Rationalized Risks). He was a speaker at the: GIPS Standards Annual Conference 2007; ICI on Risk and Measurement of Risk and Performance Related to Complex Derivatives 2012; Franklin Templeton Institutional Investor Conferences on Risk Measurement 2010-2013; and a meeting of the CFA Society Sacramento on Risk Governance 2014. Mr. Tollette was the recipient of the Institutional Investors' "Rising Star of Mutual Funds" in 2013.

GIPS Webinar

We have scheduled a webinar titled, "The GIPS Standards: Verification Overview" for Thursday, 20 August 2015 at 12:00 p.m. US ET. This webinar will provide an overview of GIPS verification as well as the benefits. This 60-minute session will provide:

- An overview of verification
- The benefits of verification
- How to obtain additional information about verification and available resources
- An overview of performance examination
- Questions and answers

Register [here](#) for this webinar.

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.

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