

Industry Survey on Fees

CFA Institute announces a new [Industry Survey on the treatment of fees](#) across the industry. The goal of the survey is to get perspective from different types of managers (Alternative, Wrap, Institutional, etc.) in various geographical locations on how they handle the different types of fees and also how they are being applied to the different fund structures. The feedback from survey participants can shed light on where the inconsistencies lie. The survey should be completed by an individual familiar with your firm's standard performance measurement processes and procedures and/or the manner in which performance results are communicated to the investing public. The responses will be kept anonymous. However, all feedback received will be combined and an executive summary will be released in the coming months.

The survey closes on Friday, 31 July. Your participation is greatly appreciated. Please [contact us](#) for questions or if you have any trouble while taking the survey.

Disclosure Guide Matrix

CFA Institute is pleased to release the [Disclosure Guide Matrix](#), a comprehensive resource checklist for disclosures related to the GIPS® standards. This document is designed to help firms ensure that all disclosures appearing in various sources are found in one document that is easy to navigate. This resource can be particularly valuable for firms newly coming into compliance with the GIPS standards. Check out the [interview](#) with Justin Guthrie, CFA, the current Chairperson of the United States Investment Performance Committee (USIPC).

GIPS Webinar

We have scheduled a webinar titled, "The GIPS Standards: Verification Overview" for **Thursday, 20 August 2015 at 12:00 p.m. US EDT**. 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.

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.

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 Website Updates

Look for a more streamlined experience on www.gipsstandards.org. We listened to your feedback, streamlined menus and simplified navigation to make the information you need easier to find. We look forward to your feedback as we continually work to improve your experience with our website.

Asset Manager Code of Professional Conduct

In June, 11 new firms registered with CFA Institute as claiming compliance with the CFA Institute [Asset Manager Code of Professional Conduct](#), bringing the current total to 1147. To learn more about the Code and how it can benefit your firm, watch a recorded version of the [Overview of Compliance with the CFA Institute Asset Manager Code of Professional Conduct](#) or [view the slide deck](#).

Let CIPM Set You Apart as an Investment Performance Professional

Only one designation offers the advanced skills in investment performance and risk evaluation that prove your skill, commitment, and integrity. The [Certificate in Investment Performance Measurement \(CIPM®\)](#) offered by CFA Institute provides a practice-based approach to attribution, manager selection, risk management to drive smarter, and more effective investment decision-making.

The CIPM curriculum is based on an advanced body of knowledge that is continuously reviewed and updated by more than 1,000 active investment practitioners around the world to ensure it is relevant to you:

- Approximately 70% of the curriculum and readings cover advanced performance evaluation (measurement, attribution, appraisal, manager selection).
- Approximately 30% covers ethical and professional standards, including how to use the Global Investment Performance Standards (GIPS).

[Learn more](#)

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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