GIPS Newsletter - July 2012

The GIPS Standards Expand to Mexico
The GIPS Executive Committee is pleased to announce that CFA Society of Mexico has been endorsed as the official sponsor of the GIPS standards in Mexico. Mexico represents the 35th country to join the global partnership to develop and promote the GIPS standards and the second Latin America country to join. Administered by CFA Institute, the success of the GIPS standards is the result of an alliance of sponsors across Europe, Americas, Asia-Pacific, and Africa. These key industry groups contribute significantly to promoting and developing the GIPS standards. (To view all groups involved in GIPS promotion and development, visit the GIPS standards website).

The GIPS Standards Annual Conference - Registration is Now Open!
The GIPS Standards Annual Conference is scheduled for 20-21 September 2012 in Boston. Please note that the date has been changed from October as previously announced. Last year’s conference sold out and space is limited, so register early.

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.

Upcoming Workshops
A GIPS Standards Interactive Workshop is scheduled for 19 September 2012 in Boston. The workshop will help participants master the requirements of the GIPS standards, including composite construction, performance calculation, and the creation of a compliant presentation. For complete details, please visit the CFA Institute website.

The Fundamentals of Performance Measurement and Attribution Workshop is also scheduled for 19 September 2012 in Boston and will provide skills immediately useful in your work and will 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.
New Appointments to GIPS Executive Committee

CFA Institute announces the appointment of two new members to the Global Investment Performance Standards (GIPS®) Executive Committee, the decision-making body for the GIPS standards. Martin Schliemann and Sue Pike, CFA, CIPM have been elected and appointed, respectively, for two-year terms.

Schliemann is a managing director at Frankfurt Finance Audit Wirtschaftsprüfungsgesellschaft mbH in Germany and has more than 20 years of experience in the investment performance field. He was elected chair of the GIPS Council and will serve on the GIPS Executive Committee beginning 1 September 2012. He is a past member of the Verification/Practitioner Subcommittee and has served as the German Country Sponsor representative for over five years.

Pike is senior manager of performance services at Wellington Management Company (U.S.) with over 10 years of investment and performance measurement experience. She will chair the GIPS Investment Manager Subcommittee and serve on the GIPS Executive Committee effective immediately. She has been an active member of the Investment Manager Subcommittee for the past two years.

CIPM Enrollment Now Open – a great way to learn the GIPS standards

To earn the Certificate in Investment Performance Measurement (CIPM), you must pass two levels of examinations that test your mastery of ethical and professional standards, performance measurement, attribution, and appraisal, and the GIPS standards. Mastering these topics helps you better understand, compare, and present investment results, and demonstrates your professional credibility. Learn more about the CIPM course of study and enroll now for the October 2012 exam window.

Executive Committee Open Meeting

We are pleased to announce that the upcoming GIPS Executive Committee open meeting will be held on 19 October 2012 in Charlottesville, VA, USA. If you are interested in attending this meeting as an observer, please send an email to standards@cfainstitute.org no later than 17 August 2012 for further details and to receive an Intention Form. Please note that meeting space is limited and observers can be confirmed until capacity is reached.

Staying Current

Stay up to date by signing up for the GIPS Standards Newsletter and by following us on Twitter. Please visit the GIPS standards website for additional information and resources, including webcasts and podcasts from past GIPS standards conferences.