

Firm Notification Requirement Deadline Approaching

GIPS®-compliant firms have until 30 June 2015 to meet the new firm notification requirement deadline. GIPS-compliant firms must notify CFA Institute of their compliance by submitting the GIPS Compliance Form which is available on the [GIPS website](#). The GIPS Compliance Form collects only limited information: name of firm, address, contact information, and verification status, while providing more extensive data (e.g., firm type, assets under management, asset classes managed, and investment vehicles offered) is optional for firms. Firm specific information will be kept confidential; however, summary information or statistics from the database may be released publicly. If you missed the webinar on this topic, the slides and recording are available at the [GIPS website](#) where detailed information on this requirement can be found.

In 2014, the GIPS Executive Committee approved the new requirement that firms claiming compliance with the GIPS standards must notify CFA Institute of such claim and the new requirement became effective as of 1 January 2015.

For a list of firms that have completed the requirement, please see the [GIPS website](#). For additional information, please contact gipscompliance@cfainstitute.org.

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 Subcommittee and Working Group Volunteers Needed

CFA Institute is looking for volunteers to serve as members on the Investment Manager Subcommittee, Asset Owner Subcommittee, Verification Subcommittee, Interpretations Subcommittee, and the Real Estate Working Group for the 2015–2016 term (which begins Tuesday, 1 September 2015). If you are interested in volunteering to serve on a GIPS [Subcommittee](#) and/or working group, please fill out the [Volunteer Interest Form](#) by **30 June 2015**.

Asset Manager Code of Professional Conduct

As part of [Putting Investors First](#) month in May, CFA Institute hosted three live, one-hour webinars on May 20 for each of the APAC, EMEA, and Americas regions. Over 90 participants from 19 countries took part in the webinars, which provided an overview of compliance with the CFA Institute [Asset Manager Code of Professional Conduct](#). To learn more about the Code and how it can benefit your firm, [watch a recorded version of the webinar](#) or [view the slide deck](#).

In May, 3 new firms registered with CFA Institute as claiming compliance with the Asset Manager Code.

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, and risk management to drive smarter, 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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