

GIPS® Executive Committee Open Conference Call

The GIPS Executive Committee has scheduled an open conference call for Tuesday, 26 May 2015 from 8:00 to 8:30 a.m. US Eastern Time to provide an update on the GIPS standards. 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.

GIPS Webinars

Firm Notification Requirement Webinar

Due to overwhelming response, we have scheduled a second **Firm Notification Requirement Webinar for Monday, 18 May 2015 at 9:00 a.m. US EDT**. This GIPS Standards Webinar will provide information on the new requirement for firms claiming compliance with the GIPS standards to notify CFA Institute of such claim. This free webinar will be interactive and CFA Institute staff will provide participants with important GIPS guidance as well as the opportunity to ask questions. The 60-minute session will include:

- Reasons why this new requirement has been added to the GIPS standards
- A step-by-step introduction of the form
- Find out what happens to the information once you have submitted it
- Frequently asked questions about the form

Register [here](#) for this webinar.

Implementation Assistance for GIPS Compliance Webinar

We have also scheduled a webinar titled, **Implementation Assistance for GIPS Compliance on Wednesday, 27 May 2015 at 9:00 a.m. US EDT**. This webinar will provide, through practical suggestions, assistance to those considering GIPS compliance. This 60-minute session will introduce the [5 steps to becoming compliant](#):

- LEARN: GIPS resources including the GIPS website and other learning tools
- ANALYZE: discussing the firm's ability to comply including
 - Track record
 - Definition of the firm
 - The concept of non-discretionary
 - GIPS Compliance team
 - System capabilities
- BUILD: Practical implementation of items from ANALYZE along with
 - Error correction
 - Developing policies and procedures
 - Composite construction and population
- IMPLEMENT: Discusses the production of the outputs including
 - Compliant presentations
 - Data for third parties and internal use
 - Production cycle
 - Verification
- STAY: Stay up to date with the GIPS standards

- [Question and Answers](#)

Register [here](#) for this webinar.

GIPS Annual Conference and Workshops

The [GIPS Standards Annual Conference](#) is scheduled for 17-18 September 2015 in San Diego. 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.

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 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.

Asset Manager Code of Professional Conduct

As part of the [Putting Investors First month](#) in May, there will be a live, one-hour webinar on 20 May 2015 for each of the APAC, EMEA, and Americas regions. Each webinar will provide an overview of compliance with the CFA Institute Asset Manager Code of Professional Conduct. IF your firm is not already in compliance with the Asset Manager Code, learn more about the Code and how it can benefit your firm. Register for the webinar:

- [APAC region at 10:00 a.m. \(HKT\)](#)
- [EMEA region at 12:00 p.m. \(BST\)](#)
- [Americas region at 12:00 p.m. \(EDT\)](#)

In April, 6 new firms registered with CFA Institute as claiming compliance with the Asset Manager Code.

Save \$100 USD on CIPM® Program Fees

The CIPM designation can set you apart as a deeply knowledgeable investment performance professional committed to your clients' best interest and your firm's success.

Offered by CFA Institute, a respected global leader in investment education and ethics, the CIPM Program delivers practice-based approaches and skills for effective investment performance and risk evaluation, manager selection, and investment reports steeped in accountability.

[Sign up today to learn more about the program and to receive a discount on program fees.](#) This offer is only available until 31 May 2015.

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.

© 2015 CFA Institute. All rights reserved.
915 East High Street, Charlottesville, VA 22902

[Contact Us](#) · [Manage Your Account](#) · [Unsubscribe](#)