

Investment Risk and Fees: Annual GIPS® Conference Highlights

Missed the conference this year? Or want to relive the excitement? Check out our [blog](#) post recapping this year's GIPS Standards Annual Conference in San Diego, California. The conference drew large crowds of investment professionals to hear what experts in the field had to say about the vital topics on everyone's minds. But there is no substitute for attending the conference in person, especially for the networking aspect. So mark your calendars for next year's annual conference, which will be held in Boston, Massachusetts, on 22–23 September 2016; we'll be celebrating 30 years since the creation of the GIPS standards and our 20th GIPS Standards Annual Conference.

Understanding Investor Behavior and Managing Risk

At the 2015 GIPS Standards Annual Conference in San Diego, Dan diBartolomeo, president and founder of Northfield Information Services, discussed behavioral aspects of risk in financial markets, including how individual behavior shapes the way the industry deals with risk and common risk measures that are potentially useful but often misunderstood. Check out our [blog](#) post on that session.

GIPS and Alternatives: CalPERS Takes Notice, Others Likely to Follow

With over 30 [country sponsors](#) and broad support from the industry, the [GIPS standards](#) are seen by many investors as a required way of doing business for any investment managers they hire. However, alternatives managers have lagged behind traditional managers in claiming compliance with the GIPS standards. Some of the reasons we've heard in the past are that alternatives are too complex, GIPS doesn't cover these kinds of strategies, and our clients are not demanding it. Read in this [blog](#) post why we believe this is now changing.

Asset Manager Code of Professional Conduct

To date, [1,230 firms in 40 countries](#) have registered with CFA Institute as claiming compliance with the Asset Manager Code of Professional Conduct. We have recently instituted the ability to search for [firms claiming compliance with the Asset Manager Code](#) by name, city, province, region, or country. To learn more about the code and how it can benefit your firm, watch a recorded version of the [An Overview of Compliance with the CFA Institute Asset Manager Code of Professional Conduct](#) or [view the slide deck](#).

Ethical Decision-Making for Investment Professionals Online Course

CFA Institute recently launched a [self-paced ethical decision-making course for members](#). This course presents the ethical decision-making framework and uses multimedia case studies of real-world situations to test your application of the framework. Take the course to see how many clients you can bring to your virtual waiting room. The course qualifies for 1.5 SER Continuing Education credits.

Is Your Society Interested in Hosting a Webinar?

We offer live, interactive webinars on the fundamentals of [GIPS Standards Compliance](#), the [Asset Manager Code of Professional Conduct](#), and [Ethical Decision-Making for Investment Professionals](#). Our webinar technology is flexible and allows people to participate in the same event from multiple locations. CFA Institute professional standards staff will work with you to schedule an online event, and then you can promote it to your members. We provide online registration, the webinar technology platform, and instructors for each one-hour program. For more information on scheduling a webinar

for your society, contact ethicstraining@cfainstitute.org.

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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