

Volunteer for GIPS® Standards Committees: 15 April Deadline

We are actively recruiting volunteers to serve on the [GIPS Executive Committee](#), [GIPS Technical Committee](#), and [United States Investment Performance Committee \(USIPC\)](#). If you are interested in these volunteer opportunities, please click on the corresponding hyperlink to complete and submit an application. The application deadline is 15 April 2016. For additional information, please contact standards@cfainstitute.org.

74% of Top 100 Global Asset Management Firms Claim GIPS Compliance

With a full year of data available to us, we now have a better picture of the widespread reach of the GIPS standards, both regionally and by amount of assets under management (AUM) by GIPS-compliant firms. Seventy-four of the top 100 global asset management firms claimed compliance with the GIPS Standards for some or all of their business as of 31 December 2014. Those firms represent 60% of the world's AUM (accounting for more than \$46 trillion of the total \$78 trillion). Check out our recent [blog post](#) for more information.

2016 GIPS Compliance Form Now Available

The enhanced, user-friendly [GIPS compliance form](#) is now available for submission. The new form features an improved confirmation screen listing all information submitted as well as an email confirmation to facilitate firms' recordkeeping. The deadline for firms to notify CFA Institute of their claim of compliance is 30 June with information as of 31 December 2015. For questions related to this requirement, please contact gipscompliance@cfainstitute.org.

Comment on Exposure Draft: Broadly Distributed Pooled Funds

The [exposure draft](#) for the Guidance Statement on Broadly Distributed Pooled Funds is available for public comment. The purpose of this guidance statement is to address the application of the GIPS standards from the perspective of pooled unitized investment vehicles with broad distribution, where there is typically no or minimal contact between the firm managing the pooled fund and prospective pooled fund investors. Please [email us](#) your feedback by 29 April 2016.

Asset Manager Code of Professional Conduct: Free Webinar Series and New Claims of Compliance

CFA Institute and the [Regulatory Compliance Association](#) have partnered to create an implementation platform for the [CFA Institute Asset Manager Code of Professional Conduct](#) that provides detailed guidance and model compliance policies that will allow managers to efficiently and effectively adopt the Code. For more information, [sign up now](#) for the free, live webinar series featuring representatives from firms currently in compliance with the Asset Manager Code.

Mutual fund complex [MFS Institutional Advisors, Inc.](#) and [MFS Investment Management](#) recently claimed compliance with the Asset Manager Code. To date, [1,288 firms in 42 countries and regions](#) have registered with CFA Institute as claiming compliance with the Code.

Ethical Decision Making for Pension Plan Trustees

On 7 June, CFA Institute will present a live, case-based ethical decision-making webinar for pension trustees that will inform participants of the ethical principles applicable to those responsible for overseeing pension-fund investing. The webinar will include:

- An examination of the fundamental ethical principles applicable to pension fund trustees focusing on the [CFA Institute Pension Trustee Code of Conduct](#)
- A discussion of a framework for incorporating an ethical perspective into a trustee's decision-making process
- An explanation of how to apply a framework for analysis of ethical dilemmas common to pension trustees
- Several case studies involving real-life situations with the opportunity for participants to vote on the appropriate conduct
- A facilitated discussion of those case studies that allow participants to apply the ethical framework

[Registration is free](#) for the 90-minute session, which is eligible for 1.5 CE credits (including 1.5 SER credits).

Staying Current

Stay up to date by following us on [Twitter](#). Please visit the [GIPS Standards website](#) for additional information and resources, including webcasts on various topics and podcasts from past GIPS Standards Annual Conferences. And check out the [GIPS Standards in the News](#) section of our website for media articles.

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