



Register Now! Early Bird Pricing Ends 16 August!

The [22nd Annual GIPS® Standards Conference](#), a must attend event for investment performance or compliance professionals, is in Austin, Texas, on 13–14 September 2018. At the conference, you will learn everything you need to know about GIPS 2020 — the next edition of the GIPS standards — which is being released for public comment on 31 August (see below). You will also meet other performance specialists from around the world and hear from performance and compliance experts. The GIPS 2020 sessions will cover what is changing and what those changes mean to you, how the GIPS advertising guidelines are evolving to integrate broad and limited distribution pooled funds, the impact of the updated standards on asset owners and alternative investments, and using money-weighted versus time-weighted returns. You will also learn about the SEC’s new advertising rule, how to put your ethical values into practice, how technology is changing the industry, and much more. [Register](#) by 16 August and save USD US\$200.

GIPS 2020 Exposure Draft Release — We Want to Hear from You

We are releasing the exposure draft for the next edition of the GIPS standards — GIPS 2020 — for public comment on 31 August. This new edition will make the GIPS standards relevant and applicable to all asset managers, regardless of their structure, client type, asset class, or investment strategy. We are also introducing a new organizational structure for the Standards. The sections in GIPS 2020 are now organized by type of firm report — GIPS Composite Report, GIPS Pooled Fund Report, or GIPS Asset Owner Report — and are self-contained to reduce complexity and eliminate the need to go back and forth between sections to determine which requirements apply. We believe this approach will provide clarity and simplify the preparation of GIPS reports.

GIPS 2020 also incorporates many other improvements:

- Key GIPS requirements released after the 2010 edition
- Recommendations received on Guidance Statements that went through a public comment period (e.g., Risk, Supplemental Information, Benchmarks)
- A self-contained section that details all that asset owners need to do to become GIPS compliant.

In addition, under GIPS2020, pooled funds are no longer required to be included in a composite if the pooled fund strategy and composite strategy are different, and firms can choose to present money-weighted returns instead of time-weighted returns when certain tests are met for a specific composite or pooled fund.

Visit www.gipsstandards.org to download the GIPS 2020 Exposure Draft after 31 August and send us your comments by 31 December 2018.

Join GIPS Standards Representatives at the Ascendant Compliance Conference, 1–3 October 2018

Decrypting Regulations: Cracking the Code to Powerful Compliance Program.

Ascendant's fall conference in San Diego, CA, offers sessions on cornerstone compliance topics, such as ethics, annual reviews, personal trading, and portfolio management while also diving into evolving subjects and their regulatory implications, including cybersecurity, initial coin offerings, artificial intelligence, cryptocurrency, and blockchain.

In a session on Monday, a panel discussing best practices in performance reporting and advertising will feature Sidney Hardee, CFA, a member of the US Investment Performance Committee (USIPC), which serves as the official GIPS sponsor in the United States, and Arin Stancil, CFA, CIPM, who serves on the GIPS Executive Committee. Paul Kovarsky, CFA, director of Institutional Relationships at CFA Institute, is also among the conference speakers who will share their expertise in the field. [Register](#) using the discount code CFA18 to receive half off a preconference workshop.

Staying Current

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