

11–12 September 2019
Fairmont Scottsdale Princess
Scottsdale, Arizona, USA

Hosted with CFA Society Phoenix

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23RD ANNUAL GIPS STANDARDS CONFERENCE

#2020performance

Early Bird Discount: Register by 9 August 2019 and save US\$200

Save an additional US\$100 with discount code **GIPS19-NL**

Register Now for the 23rd Annual GIPS Standards Conference! Early Bird Pricing Ends 12 August!

The [23rd Annual Global Investment Performance Standards \(GIPS®\) Conference](#), a must attend event for investment performance or compliance professionals, is in Scottsdale, AZ on 11–12 September 2019. At the conference, you will learn about the 2020 GIPS standards. Sessions will cover the key changes/additions to the 2020 GIPS standards, including marketing of pooled funds versus composites, differentiating broad versus limited distribution pooled funds, appropriate use of money-weighted returns versus time-weighted returns, changes to the GIPS Advertising Guidelines for broad distribution pooled funds, and the expanded ability to use carve-outs. You will also learn about the latest trends in database reporting, and recent SEC regulatory cases on cyber-security and other enforcement, actions, and much more. You will also meet other performance specialists from around the world and hear from performance and compliance experts. [Register by 12 August and save USD 200.](#)

GIPS Standards Interactive Workshop

If you are looking to learn how to best apply the [GIPS standards](#) or get the most out of them for your firm and clients, then you will want to attend one of the CFA Institute GIPS Standards Interactive Workshops.

This all-day workshop provides practical lessons for beginners and experienced analysts alike, an in-depth overview of the GIPS standards and helps participants master the fundamentals, including composite construction, performance calculation, and creating GIPS reports. It is perfect for anyone involved in investment performance measurement, reporting, or compliance.

[Scottsdale, Arizona, USA](#)

10 September 2019

Register by 9 August 2019 and save USD 200

[Boston, Massachusetts, USA](#)

16 October 2019

Register by 18 September 2019 and save USD 200

[New York City, New York, USA](#)

13 November 2019

Register by 16 October 2019 and save USD 200

[Seattle, Washington, USA](#)

24 March 2020

Register by 25 February 2020 and save USD 200

For future conferences, workshops, webinars, or other events on the GIPS standards, please check the [CFA Institute website](#). If the GIPS standards newsletter was forwarded to you and you are not a CFA Institute member, be sure to [subscribe](#).

Last Chance to Register for 2020 GIPS Standards Webinars

CFA Institute has scheduled live webinars on the 2020 GIPS standards that will provide an overview of key concepts in the 2020 edition of the GIPS standards that are applicable to investment managers and asset owners. These webinars are scheduled for two different times each day to accommodate global locations.

[Introducing the 2020 GIPS Standards for Firms](#)

Register today - 7 August 2019 at 11:00 a.m. (registration full) and 8:00 p.m. ET

[Introducing the 2020 GIPS Standards for Asset Owners](#)

Register today - 8 August 2019 at 11:00 a.m. ET and 8:00 p.m. ET

Please note, to participate in a session, you must have access to a computer with speakers or headphones. There are no dial-in numbers for these webinars.

GIPS Standards Service Provider List

CFA Institute often receives questions via the GIPS Standards Help Desk email asking for the names of local GIPS standards verifiers, software providers, etc. We believe that providing such a list would be helpful. We are in the process of creating a centralized list that will be maintained on the website. As a first step we would like to identify any GIPS standards service providers that would like to be included on this list. To receive future communication about this list please send us an email at standards@cfainstitute.org.

GIPS Standards Volunteer Recognition

The release of the 2020 edition of the GIPS standards is the result of a multi-year effort with hundreds of volunteers contributing thousands of hours. We express our deep appreciation to everyone who contributed to the 2020 GIPS standards, and would like to recognize the following GIPS standards committees, subcommittees, and working groups:

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