

Firm Notification Requirement Deadline Is 30 June

Visit our [GIPS® website](#) to fill out the compliance form and notify us of your firm's GIPS compliance by Thursday, 30 June.

You can also find a list of firms that have completed the requirement, listen to a webinar, and see related slides on this topic on [our website](#). For more information, please contact gipscompliance@cfainstitute.org.

Registration Now Open for One-of-a-Kind Annual Conference

Registration is now open for the [20th Annual GIPS Standards Conference](#), which will take place in Boston on 22–23 September 2016. Subject-matter experts will share best practices and speak to the key issues and major developments in global investment 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, learn how to ensure that your firm maintains compliance, and meet other performance specialists from around the world.

A day before the conference, two workshops are planned.

- A [GIPS Standards Interactive Workshop](#) is scheduled for Wednesday, 21 September. 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, 21 September, 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.

New Document Assists Firms Considering Compliance with the GIPS Standards

To assist firms considering becoming compliant with the GIPS standards, CFA Institute has produced "[Assistance to Firms Considering Compliance with the GIPS Standards](#)." It guides firms through the [five steps to comply with the GIPS standards](#): learn, analyze, build, implement, and stay.

Major Pension Plan Funds Endorse Our Asset Manager Code

CalSTRS (California State Teachers' Retirement System), CalPERS (California Public Employees' Retirement System), PRIM (Pension Reserves Investment Management Board), and five other influential North American pension plan sponsors have expressed support for the [Asset Manager Code of Professional Conduct](#) and publicly encouraged other firms to comply with the code.

The endorsement is part of the CFA Institute open letter campaign to promote the Asset Manager Code. Under this initiative, eight major pension plan sponsors "signed on" to a [letter expressing support for the Code](#). CFA Institute paid to publish the letter with the list of signatories in the *Wall*

Street Journal, Pensions & Investments, the Globe and Mail (Toronto), and the French language *Le Devoir* (Montreal) in conjunction with the CFA Institute Annual Conference.

"We believe that a public and united show of support for the Asset Manager Code by a significant set of asset owners will spur managers to consider compliance with the Asset Manager Code," Jon Stokes, JD, director of professional standards, wrote in a [blog post](#) about the effort in May. This will be an ongoing initiative and allow other asset owners and pension plans to join the "original signatories" to show their support of the Asset Manager Code, he explained. The signatories are CalPERS, CalSTRS, the Illinois Municipal Retirement Fund, PRIM, the Florida State Board of Administration, la Caisse de dépôt et placement du Québec, the Virginia Retirement System, and the Washington State Investment Board.

To date, [1,321 firms in 46 countries and regions](#) have registered with CFA Institute as claiming compliance with the Code. Notable recent compliant firms include MFS Investment Management, T. Rowe Price, and PIMCO (Pacific Investment Management Company).

The open letter campaign comes on the heels of institutional investors ranking ethical standards as the most important attribute of a firm, according to findings of our recent survey "[From Trust to Loyalty: A Global Survey of What Investors Want](#)."

Portfolio Reporting and Risk Management Round-table in Thailand

CFA Society Thailand and Bloomberg are hosting a half day round-table discussion on best practice and international experience on portfolio performance and risk management on Monday, 27 June beginning at 9:30 a.m. (ICT). Please visit the [GIPS website](#) "Upcoming Events" for more information about this event and how to register.

Staying Current

For the latest GIPS news, follow us on [Twitter](#) @GIPS. Visit our [website](#) for more information and resources, including webcasts and podcasts featuring a variety of topics and experts. And check out [GIPS Standards in the News](#) for media coverage about us.

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