

Compliant with Asset Manager Code? Renew Your Notification Today!

As we announced back in September (2016), CFA Institute now requires firms that claim compliance with the Asset Manager Code to renew their claim annually. As noted in a [follow up blog post](#), we believe that moving to annual notification will strengthen the Code and provide several advantages. Annual notification furthers the goal of making the Asset Manager Code industry best practice for investment managers. It signals to firms and investors that compliance with fundamental ethical standards is not a "check the box" or "one and done" proposition, but it's an ongoing process of continually committing to ethical practice and working for clients' best interest. Annual notification will also ensure that CFA Institute has up-to-date information about firms that claim compliance as well as updated contact information. Please renew your [claim of compliance](#) by **30 June 2017**.

Compliant with the GIPS® Standards? You Also Need to Submit Your Notification!

Firms that are compliant with the GIPS standards are required to notify CFA Institute of their compliance by **30 June** with information as of 31 December 2016. This year, we greatly improved the [GIPS compliance form](#). The form now features the capability for firms to locate their previously submitted record, create a login, and edit as necessary. As it has been for the past few years, this notification is an annual requirement and must be submitted each year that a firm claims compliance with the GIPS standards. For questions related to this requirement, please contact gipscompliance@cfainstitute.org.

German GIPS Standards Day

The [German Asset Management Standards Committee \(GAMSC\)](#), which serves as the German [GIPS Country Sponsor](#), is holding their 11th Annual GIPS Day. During this event, the group offers lectures, discussions, and workshops that focus on various GIPS-related topics on **Tuesday, 14 March 2017**, in Frankfurt, Germany. The following workshops are scheduled:

- Workshop 1: Basic Principles of the GIPS Standards conducted by Martin Schliemann
- Workshop 2: Guidance Statement on Supplemental Information conducted by Hans Pieper and Krzysztof Szlachta, CFA
- Workshop 3: GIPS Standards for Private Asset Managers conducted by Andreas Schmidt-von-Rhein

[Register here](#) if you are interested in attending this event. Please note that most of the presentations will be in German.

Reminder: CFA Institute Seeks Volunteers for GIPS Standards Committees

Volunteers are actively being recruited to serve on the following oversight committees that promote ethics and integrity and instill trust through the use of the GIPS standards.

The [GIPS Executive Committee](#) serves as the governing body of the GIPS standards, and is responsible for the strategic development, promotion, adoption, and implementation of the Standards. Nominees are being recruited for two industry at-large members who are committed to the purpose and mission of the GIPS standards. Nominees will have broad, in-depth industry experience and some GIPS standards-specific knowledge. Nominees from the Asia-Pacific region are particularly encouraged in order to ensure the geographic diversity of the GIPS Executive Committee members.

All GIPS Executive Committee members are senior-level industry representatives with a minimum of 10–15 years of professional investment industry experience and expertise with investment performance.

The [GIPS Technical Committee](#) provides technical oversight of the GIPS standards and is authorized to issue guidance, Q&As, and interpretations. The Technical Committee also implements procedures and controls to ensure that the GIPS standards are consistently applied, interpreted, expanded, and verified. Extensive knowledge of the GIPS standards is required for members of the GIPS Technical Committee. Nominees are being recruited for one at-large member. Nominees should have broad, in-depth industry experience. The time commitment for this role is significant.

The [United States Investment Performance Committee \(USIPC\)](#) serves as the United States Country Sponsor committee and acts as a forum for stakeholders of the GIPS standards. The purpose of the USIPC is to promote the adoption, implementation, and development of the GIPS standards as industry best practice for calculating and presenting investment performance. The committee discusses pertinent issues faced by industry professionals in the US market as well as develops resources, provides feedback on technical guidance, and promotes the GIPS standards through outreach activities.

If you have any questions, please contact volunteers@cfainstitute.org. The deadline to [submit Nominations Applications](#) (listed under "Now accepting applications") for the above mentioned volunteer openings is **10 April 2017 by 5:00 p.m. EDT**.

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 of the GIPS standards.

© 2017 CFA Institute. All rights reserved.
915 East High Street, Charlottesville, VA 22902

[Contact Us](#) | [Manage Your Account](#) | [Unsubscribe](#)