

NEWSLETTER

Global Investment Performance Standards

May 2024 Edition

Registration is Now Open! 28th Annual GIPS® Standards Conference

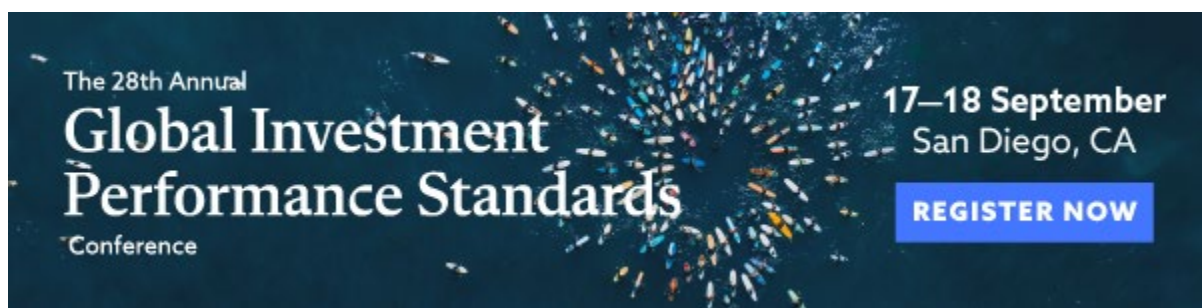
Join us 17–18 September in San Diego to reconnect with colleagues as industry and regulatory experts discuss the latest trends and challenges in investment performance. Session details will be announced in June.

Register by 30 June for our best rates.

[Register Today](#)

Is your firm interested in being a conference sponsor? Contact Jonathan.Gentry@cfainstitute.org.

If you are unable to join us in person but you would like access to the event content, please consider the Digital Content Package.



Volunteer Opportunities for GIPS® Standards Committees—Deadline to Apply Fast Approaching

CFA Institute is actively recruiting volunteers to serve on the following committees and subcommittees:

- GIPS Standards Technical Committee
- GIPS Standards Asset Owner Subcommittee

- GIPS Standards Interpretations Subcommittee
- GIPS Standards Verification Subcommittee
- GIPS Standards for Fiduciary Management Providers Technical Committee
- GIPS Standards United States Investment Performance Committee (USIPC)

In addition, CFA Institute is seeking to fill the Chair position on the following committees and subcommittees:

- GIPS Standards Interpretations Subcommittee
- GIPS Standards for Fiduciary Management Providers Technical Committee
- GIPS Standards United States Investment Performance Committee (USIPC)

Volunteers are welcome to apply for multiple roles but will not be selected to serve on more than one committee or subcommittee for the GIPS standards at the same time. Volunteers may serve on a GIPS standards committee or subcommittee and on an ESG committee or subcommittee concurrently.

For current volunteers wishing to apply as a member of a different committee or subcommittee, you must agree to rotate off your current committee or subcommittee as of 31 August 2024 before applying for upcoming volunteer positions. If your volunteer term is expiring as of 31 August 2024, you may apply for any open volunteer role, including for your current committee or subcommittee.

In addition to volunteer qualifications, the Nominations Committees will consider geographic and employer diversity. Volunteers are appointed as individuals, not as representatives of their employer, and thus cannot assign a proxy to serve in their absence.

Our volunteer platform, the [CFA Institute Community](#) (powered by Higher Logic), houses all volunteer application details and information for the committee/subcommittee positions mentioned above. To get started, you will need to:

- [Log in](#) with your CFA Institute credentials.
 - If you already have a CFA Institute login, we encourage you to use it. If not, you can create a new account.
- Agree to the [Terms and Conditions](#) of the community platform.
- Create your community and volunteer profiles.
- Apply to the volunteer opportunities that interest you.

The deadline to apply for volunteer positions is 20 May 2024 by 5:00 PM ET. If you have any questions, please email volunteers@cfainstitute.org.

Annual GIPS® Compliance Notification Form Deadline Is 30 June 2024

Organizations that claim compliance with the GIPS standards are required to notify CFA Institute of their claim of compliance by submitting a GIPS Compliance Notification Form. Organizations that are newly claiming compliance with the GIPS standards must

submit the GIPS Compliance Notification Form before publicly claiming compliance.

Once an organization claims compliance, it must submit an updated GIPS Compliance Notification Form annually, between 1 January and 30 June of each year. Required information includes the name of the organization, contact details for a primary and secondary contact, and whether or not the organization has been verified within the past 24 months.

Answers to other questions, including types of portfolios managed and total assets managed, are optional. All information provided must be as of the most recent 31 December.

Organizations submitting a GIPS Compliance Notification Form for the first time should use the [Initial Form link](#). Organizations submitting an annual update should use the [Update Form link](#).

To begin the annual update process, enter your organization's name and one individual's contact information from the prior form. A link to the prior form will be emailed to this contact, who can then update the form.

If you receive an error message, or both contacts from the prior form are no longer with your organization, please email us at gipscompliance@cfainstitute.org, and we will assist you.

Annual Asset Manager Code™ Compliance Notification Form Deadline Is 30 June 2024

Many organizations that claim compliance with the GIPS standards also claim compliance with the Asset Manager Code™ (AMC). Organizations that claim compliance with the AMC are also required to notify CFA Institute annually, similar to the GIPS standards annual notification process. Notification forms are due 30 June 2024. Firms and asset owners can find the AMC Compliance Notification Form on the CFA Institute Research and Policy Center website.

Organizations submitting an AMC Compliance Notification Form for the first time should use the [Initial Form link](#). Organizations submitting an annual update should use the [Update Form link](#).

To begin the annual update process, enter your organization's name and one individual's contact information from the prior form. A link to the prior form will be emailed to this contact, who can then update the form.

If you receive an error message, or both contacts from the prior form are no longer with your organization, please email us at industrystandards@cfainstitute.org, and we will assist you.



Research and Policy Corner

Platforms such as ChatGPT have enabled access to powerful large language models (LLMs), shifting the conversation around the future of investing and evolving job roles in the industry. CFA Institute has long maintained that the future of the investment profession is strongly rooted in the cross-collaboration of artificial and human intelligence and their complementary cognitive capabilities.

ESG investing is one area with the potential to use natural language processing (NLP) to manage the alternative and unstructured datasets.

The latest report from the CFA Institute Research and Policy Center, “[Unstructured Data and AI: Fine-Tuning LLMs to Enhance the Investment Process](#),” explores many of the issues to be considered. It showcases a case study illustrating the value in leveraging open-source data tools to generate new investment ideas. Download the report [here](#).

Earn the Leading Designation for Performance Evaluation

The Certificate in Investment Performance Measurement (CIPM[®]) Program delivers practice-based approaches that prepare you for effective investment performance evaluation, manager selection, and investment reporting.

Trust, transparency, and analytical expertise are essential if today’s markets are to function at their best. As a result, there is high demand for professionals who can demonstrate mastery of the skills needed to evaluate performance and risk, find actionable insights from investment decisions, and communicate performance effectively.

Early registration for the CIPM Program September 2024 exams is currently open. Register by 31 May 2024 and save USD200!

[Register Now](#)

CERTIFICATE IN INVESTMENT PERFORMANCE MEASUREMENT (CIPM®)

Get Ahead of the Curve

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