

Trademark Rules Q&A

Answer:

GIPS® is a registered trademark owned by CFA Institute. In order to maintain the right to own this trademark, CFA Institute needs to enforce its proper use, which is based on US copyright law. The following provides guidance for the proper use of the GIPS trademark:

- 1) The first time “GIPS” is used in a document, please use the complete name and the registered trademark, as follows: Global Investment Performance Standards (GIPS®).
- 2) GIPS Standards Sponsors, entities that claim compliance with the GIPS standards, software providers, verifiers, consultants, and any others that use the GIPS trademark must follow the trademark protection rules outlined below.
- 3) “GIPS” must be used as an adjective. Only the following “friend” words may be used in conjunction with “GIPS” without “standards”:
 - GIPS Advertisement
 - GIPS Advertising Guidelines
 - GIPS Asset Owner Report
 - GIPS Compliance
 - GIPS Compliant
 - GIPS Composite Report
 - GIPS Handbook
 - GIPS Pooled Fund Report
 - GIPS Report
 - GIPS Valuation

All other uses of or references to “GIPS” must state “GIPS standards...” For example:

- GIPS standards analyst
 - GIPS standards policy manual
- 4) How to Use the GIPS® Trademark:
 - Use the ® symbol (i.e., GIPS®) in the first and most prominent use of “GIPS” in a document, on a webpage, etc.
 - Use “GIPS” as an adjective and only with the acceptable “friend” words.
 - Whenever a product, service, website, report, advertisement, RFP, exhibit banner, etc. contains “GIPS” or GIPS standards as a descriptor of its products and/or services, in association with the GIPS standards, include the following disclaimer: “GIPS® is a registered trademark owned by CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein.” For text material, this disclaimer must appear on each page where “GIPS” is used within marketing materials. For websites, this disclaimer must appear at the bottom of each web page where “GIPS” is used.
 - For all other uses of “GIPS”, include the disclaimer: “GIPS® is a registered trademark owned by CFA Institute”.
 - For text material, this disclaimer must appear on each page where “GIPS” is used.
 - For websites, this disclaimer must appear at the bottom of each web page where “GIPS” is used.
 - 5) When using the GIPS® Trademark, do not:

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- Modify or change the trademark.
- Incorporate “GIPS” in a business name or product name.
- Incorporate “GIPS” in a hashtag.
- Use “GIPS” or the GIPS standards in the plural or possessive

The GIPS® Trademark Guidelines can be found on the [GIPS standards website](#). Please direct questions regarding proper use of the GIPS® trademark to the [GIPS standards Help Desk](#).