



NEWSLETTER

Global Investment Performance Standards

January 2025

Guidance Statement for OCIO Portfolios Webinar

As announced in the December 2024 GIPS Standards Newsletter, we have issued the [Guidance Statement for OCIO Portfolios](#) and will be offering a webinar on Thursday, 6 February 2025, from 1 p.m. to 2 p.m. EST, to review key concepts from the Guidance Statement.

A representative from Cerulli Associates will also review highlights from its recently issued 2024 report on the OCIO function.

[Register Now](#)

Save the Date! 29th Annual GIPS® Standards Conference

Mark your calendars for 11–12 November 2025, and join us at the beautiful [Sheraton Grand at Wild Horse Pass](#) in Phoenix, Arizona. Details will be announced this summer.

Exposure Draft of the GIPS Standards for Verifiers When Verifying Fiduciary Managers and the Guidance Statement on Verifier Independence When Verifying Fiduciary Managers

The GIPS Standards for Fiduciary Management Providers Technical Committee has released for public comment the [GIPS Standards for Verifiers When Verifying Fiduciary Managers and the Guidance Statement on Verifier Independence When Verifying Fiduciary Managers](#) (together, the “Exposure Draft”). It is available for public comment for 90 days.

The Exposure Draft applies only to verifiers conducting verifications and performance examinations of fiduciary managers managing UK pension schemes that claim compliance with the Global Investment Performance Standards (GIPS®) for Fiduciary Management Providers to UK Pension

Schemes (GIPS Standards for FMPs). Verifiers conducting a verification or performance examination of fiduciary managers complying with the GIPS Standards for FMPs would be required to conduct their engagements consistent with the requirements within these documents.

Comments may be submitted by email to standards@cfainstitute.org and must be received by 18 February 2025. Unless otherwise requested by the submitter, all comments will be made public on the GIPS standards website.

Standards of Practice Council Recruitment Open

The CFA Institute Standards of Practice Council (SPC) is accepting applications for new members. The SPC is a group of CFA charterholder volunteers who contribute to the development and promotion of ethics initiatives of CFA Institute, including global industry ethical codes and standards and ethics education products in support of CFA Institute goals and objectives. SPC members identify ethical issues in the investment industry and draft interpretive guidance for the CFA Institute Code of Ethics and Standards of Professional Conduct (Code and Standards) on those ethical issues, especially regarding new practices, technologies, or other developments related to the investment profession. SPC members must be CFA charterholders, be active in the profession, and have at least 10 years of professional experience and an understanding of the requirements of the Code and Standards. In addition to volunteer qualifications, CFA Institute will consider geography 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. To apply:

- [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 for membership in the SPC or other [volunteer opportunities](#) that interest you.

The deadline to apply for membership in the SPC is 5:00 p.m. EST on 27 January 2025. If you have any questions, please email volunteers@cfainstitute.org.

Research and Policy Corner

The Research and Policy Center's milestone investing series "Investment Innovations Toward Achieving Net Zero" breaks down the complexities of achieving net-zero goals with practical guidance for investors, asset managers, and regulators. The final papers will be released on January 15. Get additional insights from author videos and member-only "In Practice" content on each paper's page.

Learn more [here](#).

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