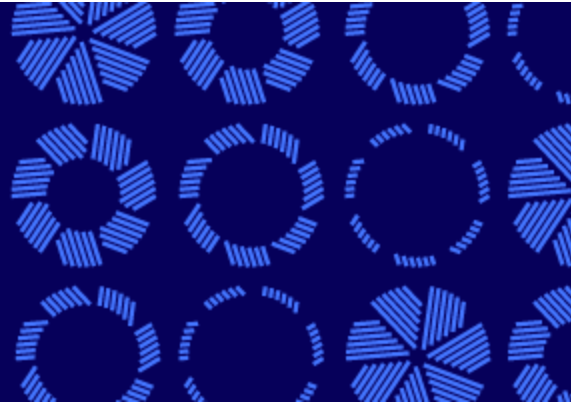


NEWSLETTER

Global Investment Performance Standards



March 2025

SEC Marketing Rule Webinar with Dechert—Register Now

On 27 March 2025 at 12:00 PM ET, CFA Institute and Dechert LLP are partnering to provide an update on regulatory developments and best practices related to the SEC’s Marketing Rule. CFA Institute and Dechert will be joined by a member of the SEC staff to address the following topics and field questions:

- Fundamental issues, including what constitutes an “advertisement” and what information is considered investment performance under the rule
- Potential SEC staff guidance regarding performance of individual investments and portfolio and investment characteristics
- Best practices for Marketing Rule compliance and avoiding common mistakes

[Register Now!](#)

 **WEBINAR**

SPONSORED BY DECHERT LLP

SEC Marketing Rule Developments and Best Practices

27 March 2025 | 12:00 PM ET



CFA Institute Seeks Volunteers for Global Industry Standards Committees

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)
- ESG Technical Committee

In addition, CFA Institute is seeking to fill the Chair position on the following committee:

- GIPS Standards Technical Committee

Volunteers are welcome to apply for multiple roles but will not be selected to serve on more than one GIPS standards committee or subcommittee 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 2025 before applying for upcoming volunteer positions. If your volunteer term is expiring as of 31 August 2025, 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 (if logging in for the first time).
- Create or update your [community](#) and [volunteer](#) profiles.
- Apply to the [volunteer opportunities](#) that interest you.

The deadline to apply for volunteer positions is 12 May 2025 by 17:00 US ET. If you have any questions, please email volunteers@cfainstitute.org.

Exposure Draft of the GIPS Standards® for Verifiers When Verifying Asset Owners

The GIPS Standards Technical Committee has released for public comment the [Exposure Draft of the GIPS Standards for Verifiers When Verifying Asset Owners](#) (“Exposure Draft”). The Exposure Draft is available for public comment for 60 days. The Exposure Draft seeks to provide verifiers with testing procedures and terminology specific to asset owners.

Currently, verifiers conducting a verification engagement of an asset owner follow the [GIPS Standards for Verifiers](#). We received feedback that the GIPS Standards for Verifiers can be challenging to apply to asset owners because of the differences between asset managers and asset owners (e.g., different terminology).

Comments may be submitted by email to standards@cfainstitute.org and must be received by 21 April 2025. Unless otherwise requested by the submitter, all comments will be made public on the GIPS standards website.

29th Annual GIPS® Standards Conference

Mark your calendar for the premier event in investment performance: the 29th Annual GIPS® Standards Conference from 11–12 November 2025 in Phoenix, Arizona.

The 29th Annual GIPS® Standards Conference brings together leading industry voices, regulators, and investment professionals for insightful discussions on the evolving landscape of investment performance and compliance. With exclusive networking

opportunities and expert-led sessions, this is an event you won't want to miss.

Share topics you'd like covered at standards@cfainstitute.org.

Showcase your firm by becoming a sponsor—contact [Jonathan Gentry](#) for details.

Stay tuned for updates!



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