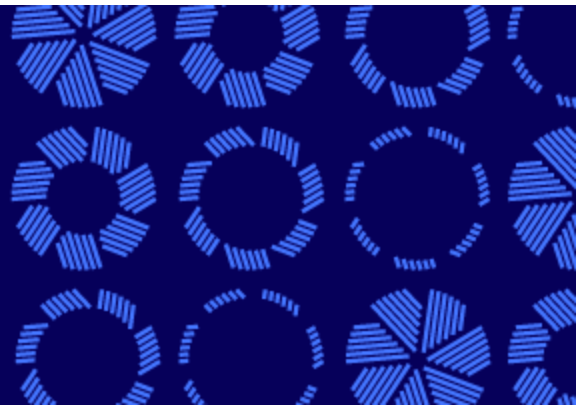


NEWSLETTER

Global Investment Performance Standards



June 2025

Registration Is Now Open! 29th Annual GIPS® Standards Conference

Join us this 11–12 November in Phoenix to reconnect with industry peers and gain valuable insights from experts on the latest trends and challenges in investment performance. The full conference agenda will be announced this summer.

Don't miss the opportunity to register by 6 July for the best rates!

[Register Now and Save](#)

Is your firm interested in being a conference sponsor? Reach out to Jonathan.Gentry@cfainstitute.org for more details.

If you can't attend in person but would still like access to the event content, consider purchasing the [Digital Content Package](#).



The 29th Annual
Global Investment Performance
Standards Conference

11-12 November 2025
Phoenix, AZ
REGISTER NOW



Asset Owner Performance Survey Report Blog Post

CFA Institute conducted a global asset owner performance survey in collaboration with the GIPS Standards Asset Owner Subcommittee in the third quarter of 2024. For a highlight of survey results, see the [blog post](#) written by Beth Kaiser Schwartz, CFA, CIPM on the CFA Institute Market Integrity Insights site. Read the [full report](#) to learn more about how global asset owners are managing and reporting performance.

GIPS Standards Translation in Spanish

CFA Institute is pleased to acknowledge and congratulate the GIPS Standards Sponsor in Spain, CFA Society Spain, on the approval of their [translation of the GIPS Standards for Firms](#) to promote adoption of the GIPS standards in their local markets. The local language translation of the standards demonstrates CFA Society Spain's commitment and dedication to advancing global best practices.

GIPS Standards Sponsors play an important role in making the GIPS standards relevant to their local markets. They own and protect GIPS standards translated materials, deliver educational programs, and promote the GIPS standards across the local investment profession.

This work to translate the GIPS Standards for Firms marks a significant step to further promote the voluntary, ethical standards for investment performance. We thank and congratulate CFA Society Spain for their partnership and ongoing contributions to global adoption of the GIPS standards.

Translated versions of the [GIPS Standards for Firms](#) and the [GIPS Standards for Asset Owners](#) are available on the GIPS standards website. More than 40 organizations around the globe, composed of national, regional, and local industry associations, currently serve as GIPS Standards Sponsors. These partners play a key role in developing and promoting the GIPS standards. For a complete list of sponsors, please visit the [GIPS standards website](#).

Two New Documents Supporting Verification of Fiduciary Managers to UK Pension Schemes

The GIPS Standards for Fiduciary Management Providers Technical Committee has released the [GIPS Standards for Verifiers When Verifying Fiduciary Managers](#) (the

“Verification Standards for FMPs”) and the [Guidance Statement on Verifier Independence When Verifying Fiduciary Managers](#) (the “Guidance Statement on Verifier Independence for FMPs”). The Verification Standards for FMPs and Guidance Statement on Verifier Independence for FMPs apply only to verifiers conducting verifications and performance examinations of Fiduciary Managers (FMs) 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 FMs complying with the GIPS Standards for FMPs would conduct a verification and performance examination according to the Verification Standards for FMPs and Guidance Statement on Verifier Independence for FMPs.

The Verification Standards for FMPs and Guidance Statement on Verifier Independence for FMPs have an effective date of 1 January 2026.

Final Reminder—Annual GIPS Compliance Notification Form Deadline Is 30 June 2025

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.

Required information includes the name of the organization, contact details for a primary and secondary contact, and whether the organization has been verified within the past 24 months. Answers to other questions, including types of portfolios managed and total assets under management, 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.

Final Reminder—Annual Asset Manager Code™ Compliance Notification Form Deadline Is 30 June 2025

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 2025. Firms and asset owners can find the AMC Compliance Notification Form under Step 4 on the [Asset Manager Code page](#) 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.



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