



NEWSLETTER

Global Investment Performance Standards

May 2025

Asset Owner Performance Survey Results Report

CFA Institute conducted a global asset owner performance survey in collaboration with the GIPS Standards Asset Owner Subcommittee in the third quarter of 2024. The [survey report](#) offers a detailed look at how asset owners around the world are approaching performance reporting, benchmarking, and GIPS® compliance.

This latest survey builds on a 2020 US-based survey by CFA Institute in conjunction with the United States Investment Performance Committee (USIPC). The 2024 survey expands the scope globally, capturing perspectives from pension funds, endowments, insurance companies, sovereign wealth funds, and family offices across the Americas; Europe, the Middle East, and Africa (EMEA); and Asia Pacific. You can find the survey report on the [Tools webpage](#) (under Asset Owners) on the GIPS standards website.

New Tools Webpage Look

The [Tools webpage](#) on the GIPS standards website has been redesigned for easier navigation. You can now quickly find the tools and resources you need by selecting “Firms,” “Asset Owners,” or “Fiduciary Management Providers to UK Pension Schemes” at the top of the page. Each category offers a comprehensive set of tools and resources tailored to that specific type of organization.

To further assist you, these tools and resources are organized by function, such as “Attaining and Maintaining Compliance,” “Calculations,” and “Survey Reports.” Additionally, any new tool or resource added to the webpage will be marked with “**NEW**” for easy

identification.

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.

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.

29th Annual GIPS® Standards Conference Registration Opens in June

11–12 November 2025 | Sheraton Grand at Wild Horse Pass, Phoenix, Arizona

The 29th Annual GIPS® Standards Conference is your opportunity to gain insight from leading voices in investment performance and compliance. Join peers, regulators, and industry experts for two days of in-depth discussions, practical guidance, and valuable networking.

For sponsorship opportunities, reach out to Jonathan Gentry at jonathan.gentry@cfainstitute.org.

More details coming soon!





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