



NEWSLETTER

Global Investment Performance Standards

September 2025

Join Us at the 29th Annual GIPS® Standards Conference on 11–12 November in Phoenix

Connect with industry leaders, regulators, and peers at the premier event focused on investment performance, compliance, and ethics. This year's agenda is packed with timely insights and practical guidance to help you stay ahead in a rapidly evolving landscape:

- Navigate the SEC Marketing Rule and its real-world impact on advertising and reporting.
- Gain practical insights into implementing OCIO portfolios in accordance with the GIPS standards as outlined in the *Guidance Statement for Outsourced Chief Investment Officer (OCIO) Portfolios*.
- Engage in thought-provoking discussions on ethical challenges in performance reporting.

Whether you're an asset owner, verifier, or investment manager, you'll walk away with practical tools and new connections, gained knowledge, and the opportunity to earn Professional Learning (PL) credit hours and NASBA CPE [National Association of State Boards of Accountancy Continuing Professional Education] credits.

[View the Agenda and Register Today](#)



The 29th Annual
Global Investment Performance
Standards Conference

11-12 November 2025

Phoenix, AZ

[REGISTER NOW](#)



SEC Marketing Rule: Common Pitfalls and Best Practices

The second Marketing Rule webinar in our series with Dechert LLP is scheduled for Wednesday, 8 October 2025 at 12:00 p.m. US ET. Experts from Dechert and CFA Institute will field audience questions and address the following topics:

- *Performance portability*: Issues and challenges related to predecessor performance under the Marketing Rule and how to address inconsistencies with the GIPS standards
- *Carve-outs and extracted performance*: How do they differ, and when do they overlap
- *The Marketing Rule FAQ on extracted performance*: Practical considerations and challenging applications
- *Calculating net returns*: Understanding the risks and benefits of using model versus actual fees

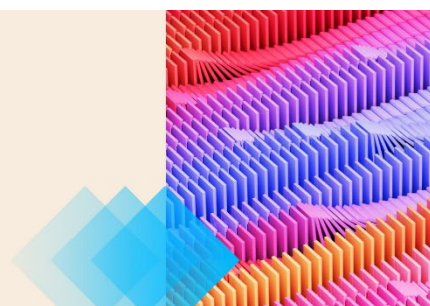
[Register Now!](#)

 **WEBINAR**

SPONSORED BY DECHERT LLP

SEC marketing rule: Common pitfalls and best practices

8 October 2025 | 12:00 PM ET | 5:00 PM BST



GIPS Standards for Verifiers When Verifying Asset Owners

On 12 September 2025, CFA Institute issued the [Global Investment Performance Standards \(GIPS®\) for Verifiers When Verifying Asset Owners](#). This guidance supersedes the

previous *GIPS Standards for Verifiers* used when conducting verification and performance examination engagements for asset owners. It was developed to align more closely with the terminology and requirements of the *GIPS Standards for Asset Owners*.

Verifiers must follow the *GIPS Standards for Verifiers When Verifying Asset Owners* for engagements covering periods beginning on or after 1 January 2026. Both the *GIPS Standards for Verifiers When Verifying Asset Owners* and the *Adopting Release* are available on the [GIPS standards website](#).



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