



NEWSLETTER

Global Investment Performance Standards

March 2026

CFA Institute Seeks Volunteers for GIPS® 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 Verification Subcommittee
- GIPS Standards for Fiduciary Management Providers (FMP) Technical Committee
- GIPS Standards United States Investment Performance Committee (USIPC)

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

- GIPS Standards Asset Owner Subcommittee
- GIPS Standards Verification Subcommittee

Volunteers are welcome to apply for multiple roles but will not be selected to serve on more than one committee or subcommittee for the GIPS standards at the same time.

Current volunteers who apply for a position on a different committee or subcommittee before their current term ends must agree to rotate off their existing role as of 31 August 2026 if selected for the new position. Volunteers whose current term expires on 31 August 2026 may apply for any open volunteer role, including reapplying to their 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.
- Create your community and volunteer profiles.
- Apply to the [volunteer opportunities](#) that interest you.

The deadline to apply for volunteer positions is 11 May 2026 by 5 p.m. US ET. If you have any questions, please email volunteers@cfainstitute.org.

A dark blue banner with the text "Call for Volunteers" in white. The background features faint, stylized icons of lightbulbs and people silhouettes in shades of blue.

Call for Volunteers

SEC Marketing Rule: Latest Developments and Practical Solutions Webinar Recording Now Available

The third SEC Marketing Rule webinar in our series with Dechert LLP took place on 24 February 2026. Experts from Dechert, the US SEC staff, and CFA Institute discussed the SEC staff's most recent investment performance FAQ and explored practical solutions to Marketing Rule challenges. Topics included:

- Calculating and presenting net performance after the staff's January 2026 FAQ on the use of model fees

- Identifying hypothetical performance and managing expectations for its use
- Expert Q&A

If you were unable to join the live webinar, you can [listen to the webinar recording](#) and [view the accompanying slide presentation](#). The accompanying materials for the prior Marketing Rule webinars, conducted on 27 March 2025 and 8 October 2025, are also available for viewing on the [GIPS standards website](#).

Annual GIPS® Compliance Notification Form Deadline Is 30 June 2026

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 2026

Many organizations that claim compliance with the GIPS standards also claim compliance with the Asset Manager Code™ (AMC). For more information about the Asset Manager Code, visit the [CFA Institute Research and Policy Center website](#).

Organizations that claim compliance with the AMC are required to notify CFA Institute annually, similar to the GIPS standards annual notification process. Notification forms are due 30 June 2026.

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.

Annual Compliance Notification Reminder



30th Annual GIPS Standards Conference

Join us for the GIPS® Standards Conference on **10–11 November 2026** at the **Loews Philadelphia Hotel**, where we will commemorate the **30th anniversary of the GIPS Standards Conference**. This year's conference will recognize three decades of advancement and influence within the global investment profession and explore the evolving role of the Standards in the years ahead.

We look forward to bringing the community together for this special occasion. More

information will be shared soon.

The 30th Annual

Global Investment Performance Standards Conference

10–11 November 2026 | Philadelphia, PA

[Save the date](#)



© 2026 CFA Institute. All rights reserved.

915 East High Street, Charlottesville, VA 22902

[Contact Us](#) | [Manage Account](#) | [Unsubscribe](#)