

NEWSLETTER

# Global Investment Performance Standards

**April 2026**

This edition of the GIPS Standards Newsletter includes information on a new Priority Access Pass for the GIPS Standards Conference, GIPS standards committee and subcommittee recruitment, and annual compliance notification reminders for the GIPS standards and Asset Manager Code.

The 30th Annual

## Global Investment Performance Standards Conference

10–11 November 2026 | Philadelphia, PA

### **GIPS® Standards Conference – New Priority Access Pass Registration Now Open!**

The GIPS® Standards Conference returns on 10–11 November 2026 at the Loews Philadelphia Hotel, marking a significant milestone as we celebrate 30 years.

This special anniversary event will highlight three decades of leadership, collaboration, and global impact across the investment industry. Attendees will have the opportunity to connect with peers and hear from leading industry and regulatory experts on the latest trends shaping investment performance.

New for 2026, we are introducing a **Priority Access Pass**, which is available to the first 100 registrants or until 15 July (whichever comes first). This enhanced experience includes a

dedicated check-in line, coat, bag and luggage check, and reserved front-of-room seating with power access. Pass holders will also receive early access to the Digital Content Package, available from 1 December 2026 through 31 January 2027.

Don't miss out, book your [Priority Access Pass today](#).

QR code if you prefer:



## Call for Volunteers

### Call for Volunteers!

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](mailto:volunteers@cfainstitute.org).

## Annual Compliance Notification Reminder



## 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](mailto: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](mailto:industrystandards@cfainstitute.org), and we will assist you.



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915 East High Street, Charlottesville, VA 22902

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