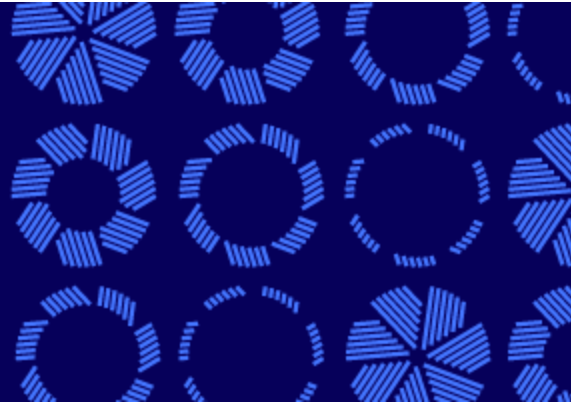


NEWSLETTER

Global Investment Performance Standards



June 2026

This edition of the GIPS® Standards Newsletter includes a reminder about the new Priority Access Pass for the GIPS Standards Conference and a call to help us bring the history of the GIPS Standards Conference to life. The final reminders for the annual Asset Manager Code™ and GIPS compliance notification are also included.

The 30th Annual

Global Investment Performance Standards Conference

10–11 November 2026 | Philadelphia, PA



GIPS Standards Conference — Still Time to Get Your Priority Access Pass!

Join us as we celebrate the 30th anniversary of the GIPS Standards Conference and explore the issues shaping the future of investment performance. This year's agenda will feature discussions on AI and its impact on performance measurement and reporting, private market trends, SEC examinations, GIPS Standards updates, and insights from the GIPS Standards Help Desk.

As part of our 30th anniversary celebrations, **we'd love your help bringing the history of the GIPS Standards Conference to life.** If you have photos, memorable quotes, or stories from past conferences and milestones, please send them to standards@cfainstitute.org

for consideration. We will do our best to incorporate all submissions into our anniversary activities and encourage attendees to continue sharing their memories during the conference as we celebrate three decades of the GIPS Standards Conference together.

Attendees can also take advantage of the new **Priority Access Pass**, available to the first 100 registrants or until 15 July, which includes a dedicated check-in line, coat, bag, and luggage check, reserved front-of-room seating with outlet access, and early Digital Content Package access from 1 December to 31 January. Connect with peers and gain valuable perspectives from industry leaders and regulatory experts as they share the latest developments and best practices in investment performance.

Don't miss out — [secure your Priority Access Pass now!](#)

QR Code if you prefer:



Annual Compliance Notification Reminder



Final Reminder—Deadline Approaching Fast!

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.

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