CFA Institute® Set the Standard



October 2026

Last Chance — Register Now for the GIPS® Standards Conference!

Join us next month for the **30th Annual GIPS® Standards Conference**, taking place at the **Loews Philadelphia Hotel** on **10–11 November 2026**. If you haven't registered yet, this is your last chance to join colleagues from across the profession for this milestone anniversary event.

You'll dig into the issues shaping investment performance today:

- AI's growing role in performance measurement and reporting
- private market trends and retailization
- SEC examination priorities
- performance-based fee calculation challenges
- verification trends and findings
- the latest GIPS standards updates

Hear directly from speakers including:

- Mark J. Dowdell, US Securities and Exchange Commission

- Lloyd Ebright, Pennsylvania Treasury
- Ashley Reeves, CIPM, TSG Performance
- other leading industry and regulatory voices

Beyond the sessions, this is one of the best networking opportunities of the year — a chance to connect with peers, compare notes, and build relationships across the profession.

Don't miss out — register today



Call for Comments — Exposure Draft of the GIPS® Standards Guidance Statement on Trade Errors

The GIPS® standards have historically required firms to have a GIPS standards error correction policy. The *Exposure Draft of the Guidance Statement on Trade Errors* ("*Exposure Draft*") introduces a new type of error policy — a GIPS standards trade error policy — and provides guidance with respect to how trade errors may be treated for performance purposes.

The *Exposure Draft* is available for public comment for 90 days. Comments may be submitted by email to standards@cfainstitute.org and must be received by 15 December 2026. Unless otherwise requested by the submitter, all comments will be made public on the GIPS standards website.



Two New Papers to Check Out

Guide for Return Attribution Reporting

CFA Institute has issued the *Guide for Return Attribution Reporting* to identify common industry practices and develop a framework that promotes fair presentation and full disclosure in return attribution reporting within marketing materials. It includes presentation and disclosure recommendations as well as samples. The *Guide* was out for public comment from 14 October 2025 through 12 December 2025.

Reconciling the GIPS® Standards and the SEC Marketing Rule

The *Reconciling the GIPS® Standards and the SEC Marketing Rule* white paper addresses the differences between the GIPS® standards and the Securities and Exchange Commission (SEC) Marketing Rule. This is the third version of this white paper. It has been updated to accommodate new FAQs published by SEC staff in addition to updates to improve the clarity of this white paper.

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