

GIPS®

July 12th – 13th

TRAINING

Just in case you're looking to spruce things up around your investment performance operations, we bring you by special demand in July this year, our introductory class to the Global Investment Performance Standards – GIPS®. Two days of everything you need to learn on the journey to claiming compliance with the global standards and the key preparatory steps. Focus is on implementing chapter 1 of the current 2020 standards – Compliance for Firms and its eight sections in a comprehensive package that incorporates the real fundamentals of performance presentation standards (PPS).

Day 1

1. Introduction to Investment Performance Evaluation
2. Investment Performance Presentation
3. Global Investment Performance Standards – GIPS®
4. GIPS for Firms
5. GIPS for Asset Owners
6. GIPS for Independent Verifiers
7. Steps and Options to claiming compliance
8. Maintaining Compliance

Day 2

1. Fundamentals of Compliance
2. Input Data & Calculation Methodologies
3. Composite and Pooled Funds Maintenance
4. Composite Time Weighted Returns
5. Composite Money Weighted returns
6. Pooled Funds Time Weighted Returns
7. Pooled Funds Money Weighted Returns
8. GIPS Advertising Guidelines
9. Guidelines, Q&As, and Interpretations