



**CFA Institute**



## 23rd Annual GIPS Standards Conference

11–12 September 2019  
Fairmont Scottsdale Princess  
Scottsdale, Arizona, United States

The attendee will:

- learn about the 2020 edition of the GIPS standards, including the major changes and additions to the GIPS standards;
- learn how high-net-worth firms can construct meaningful composites and deal with challenges for selecting appropriate benchmarks;
- become familiar with the SEC's Advertising Rule and the current SEC exam focus on performance;
- understand risk-adjusted performance measurement, including the four dimensions of performance;
- learn how to manage real-life ethical dilemmas that finance professionals may face;
- understand the trends in institutional databases and how to manage data more efficiently;
- learn why diversity and inclusion are priorities for investment leaders and what actions firms can take to be more inclusive;
- understand how best to deal with manager comparisons and analysis when subscription lines of credit are used;
- gain a better understanding of the new required verification procedures; and
- become familiar with why asset owners and consultants should demand compliance with the GIPS standards.

### **Credit Amount**

- CFA Institute CE Program: 12.75 credit hours, including 1 hour in the content areas of Standards, Ethics, and Regulations (SER)
- NASBA CPE Credit: 15 CPE (14 Finance, 1 Regulatory Ethics)

### **Additional Information**

- Delivery Method: Group Live
- Program Level: Intermediate
- Prerequisites: Finance
- Advanced Preparation: None

For additional information on the 23rd Annual GIPS Standards Conference, please visit the [conference webpage](#).

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