



CFA Institute



GIPS Standards Interactive Workshop

10 September 2019

Fairmont Scottsdale Princess

Scottsdale, Arizona, United States

The attendee will:

- Gain a practical understanding of core investment performance measurement principles
- Find out how to transition from the 2010 GIPS standards to the 2020 GIPS standards
- Learn the requirements for attaining and maintaining compliance with the GIPS standards
- Learn the acceptable calculation methodologies
- Learn how to create composites
- Learn how to prepare GIPS composite reports and GIPS pooled fund reports
- Learn how to prepare for being verified

Credit Amount

- CFA Institute CE Program: 6.5 credit hours, including 6.5 hours in the content areas of Standards, Ethics, and Regulations (SER)
- NASBA CPE Credit: 7.5 CPE (7.5 Regulatory Ethics)

Additional Information

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

For additional information on the GIPS Standards Interactive Workshop, please visit the [workshop webpage](#).

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