

## **27th Annual GIPS® Standards Conference**

17-18 October 2023

Loews Chicago Hotel

Chicago, IL, USA

The attendee will:

- Gain a clear understanding of key changes in technical guidance reflected within updated Global Investment Performance Standards (GIPS®) standards technical guidance and tools
- Understand the implementation impact of the SEC Marketing Rule
- Learn best practices around database strategy
- Gain an understanding of how to apply the GIPS standards to OCIO strategies
- Learn about the challenges of cryptoassets in custody and fiduciary duty
- Expand their understanding of current SEC examinations
- Explore risk-adjusted performance attribution
- Discover best practices in outsourcing
- Learn how to build meaningful relationships with clients, colleagues, and teams
- Explore current issues with private funds
- Understand how to calculate IRRs and meet US regulatory requirements in the US

### **Credit Amount**

- CFA Institute Professional Learning (PL) Program: Gain up to 12.5 Professional Learning (PL) credits, including 11.5 credits in Standards, Ethics, and Regulation (SER) topic areas
- NASBA CPE Credit: 14.8 CPE (9.8 Management Services, 2.6 Specialized Knowledge, 1.2 in Accounting-Technical, and 1.2 in Personal Development-Non-technical)

### **Additional Information**

- Delivery Method: Group Live
- Program Level: Overview and Update
- Prerequisites: General familiarity with the requirements of the Global Investment Performance Standards (GIPS) for Firms
- Advanced Preparation: None

For additional information on the 27th Annual GIPS Standards Conference, please visit the [conference webpage](#).

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