

25th Annual GIPS® Standards Virtual Conference

26-27 October 2021

Virtual Conference

The attendee will:

- Gain a clear understanding of key changes in technical guidance reflected within updated GIPS Standards Technical Guidance
- Understand how to comply with the Pooled Fund requirements of the GIPS Standards
- Learn insights on manager selection, monitoring, and oversight
- Gain understanding and perspective on the benefits of ESG Disclosure Standards and how they help investors
- Expand their understanding of the SEC Marketing Rule and how it applies to GIPS-compliant firms
- Understand the latest trends with databases and data collection

Credit Amount

- CFA Institute Professional Learning (PL) Program: 9 PL credit, including up to 6 hours in the content areas of Standards, Ethics, and Regulations (SER)
- NASBA CPE Credit: 9.4 CPE (4 Management Services, 3.4 Communications and Marketing, 2 Finance)

Additional Information

- Delivery Method: Group Internet Based
- 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 25th Annual GIPS® Standards Virtual Conference, please visit the [conference webpage](#).

CFA Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website www.nasbaregistry.org.