

26th Annual GIPS® Standards Virtual Conference

25-26 October 2022

Boston Park Plaza

Boston, MA, USA

The attendee will:

- Gain a clear understanding of key changes in technical guidance reflected within updated GIPS Standards Technical Guidance and tools
- Understand the performance-related concepts within the SEC Marketing Rule
- Learn data visualization tools
- Gain understanding and perspective on the growing OCIO market
- Expand their understanding of how to measure the impact of ESG factors within performance
- Explore the connections between the GIPS Standards and the ESG Disclosure Standards
- Obtain practical advice on calculating IRR
- Discover best practices in GIPS Standards implementation from an expert panel
- Learn how to apply ethical considerations to situations faced by performance professionals
- Understand the complexities of model portfolio programs

Credit Amount

- CFA Institute Professional Learning (PL) Program: Gain up to 12.5 Professional Learning (PL) credits, including 8.75 credits in Standards, Ethics, and Regulation (SER) credits
- NASBA CPE Credit: 14.9 CPE (11.4 Management Services, 2.4 Specialized Knowledge, 1.2 Regulatory Ethics)

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 26th Annual GIPS® Standards Conference, please visit the [conference webpage](#).

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