



GIPS Standards and Interpretations

GIPS 20/20 – Vision for the future of the GIPS Standards

On 17 May the CFA Institute has released a consultation paper ([consultation paper](#)) for public comment that outlines a number of important changes the GIPS® Executive Committee (EC) is considering with respect to the 2020 edition of the GIPS Standards.

With its 2020 edition of the GIPS Standards, the CFA Institute envisages more widespread adoption among alternative investment managers and managers of pooled funds. The purpose of the consultation paper is to examine the underlying causes for not adopting the Standards among these types of managers.

The consultation paper contains 23 questions divided over 13 subjects. Subjects include among others a new proposed treatment for pooled funds, the use of asset-class-specific guidance, the valuation frequency, the creation of a new category of (advisory) assets within the total firm assets and the use of estimated trading expenses.

Industry participants have the opportunity to ask questions during a live webinar ([webinar](#)) session that is planned on 31 May.

The Public Comment Period ends on 16/07/2017. The CFA Institute will update and revise the GIPS 20/20 Exposure Draft based on the ideas and input received from the consultation. The Exposure Draft is expected to be published early 2018 for a 90-day comment period.

Contact

For more information with respect to the above consultation paper or the GIPS Standards and Interpretations in general, please contact Patricia Goddet or Pieter Persoons.

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