



Global Investment Performance Standards

Providing investment performance, advisory, and attest services



The marketplace

The worldwide market for financial services is evolving rapidly. The years ahead will likely look very different than they do today. In particular, the demand for increased transparency and fair representation of investment performance results will continue to be more important than ever. Many investors are actively seeking reliable, credible, and timely investment performance data as a basis to compare investment managers globally. Deloitte has a dedicated investment performance team prepared to assist in responding to aspects of these trends. With our global perspective and local resources, Deloitte provides investment performance services to clients throughout the world.

The industry's response

The Global Investment Performance Standards (GIPS®) have been designed to promote the fundamental principles of fair representation and full disclosure of performance results. The mission of the GIPS standards is to build a level field of comparison by standardizing the way investment managers calculate and present performance to prospective and continuing clients. The GIPS standards provide a globally recognized symbol of credibility, integrity, and uniformity of investment performance results. The GIPS standards

also act as a global "passport," allowing firms to enter the global investment management arena. This dynamic set of standards continually evolves to address current trends within the investment industry.

Today, a growing number of countries throughout North America, Europe, Africa, and Asia have adopted the GIPS standards, encouraging investment management firms to follow the standards when calculating and reporting their performance results. With GIPS 20/20 underway, the adoption of the GIPS standards will increase and as the application of the GIPS standards become more widespread, particularly among alternative investments and the pooled funds, Deloitte stands ready to serve you.

Global resources, locally directed

Our local resources leverage dedicated GIPS Eminence Centers throughout North America, Europe, and Asia, helping our clients learn of developing local and international trends and issues.

We have access to a deep pool of resources via the network of member firms of Deloitte Touche Tohmatsu Limited in several countries across the globe with significant experience in providing investment performance services.

We can help

Deloitte's dedicated team of professionals provides a wide range of services related to GIPS standards compliance and other performance measurement related areas.

Gap analysis for GIPS standards compliance

We provide advisory services to help firms assess their compliance with the requirements of the GIPS standards, evaluate their current state of readiness, identify where gaps exist, and provide recommendations.

GIPS compliance verification and performance examination

We examine a firm's assertions of compliance with the requirements of the GIPS standards on a firm-wide basis (verification) and examine composite performance presentations for specified composites (performance examination).

Investment performance systems

We provide assistance with evaluating, selecting and testing new performance systems, and post-implementation troubleshooting and optimization efforts.

Industry excellence

As global leaders in providing professional services to the investment management industry, Deloitte works with clients to address a range of issues brought on by regulatory changes, competition, globalization, advances in technology, and third-party oversight. Our cross-functional industry group is comprised of nearly 2,000 US partners, managers, and staff providing a spectrum of assurance and advisory, tax, enterprise risk, regulatory, and consulting services to a broad range of investment management companies. Our clients include investment advisers and administrators from every sector of the industry, including investment managers, broker-dealers, banks, insurance companies, mutual funds, investment partnerships, hedge funds, alternative products, and other money managers.

Let's talk



Brenda Di Leo
Managing Director,
National Investment Management
Investment Performance Services Leader
Deloitte & Touche LLP
+1 212 436 5505
bdileo@deloitte.com



Rajan Chari
Partner,
National Investment Management
Investment Performance Services
Deloitte & Touche LLP
+1 312 486 4845
rchari@deloitte.com

Industry insights

Deloitte is committed to helping the investment management industry find new ideas to solve your most difficult challenges. We achieve this by sharing our insights and new perspectives on a regular basis through a variety of interactive programs. Whether it's logging on to one of our Dbriefs webcasts, tuning into a Deloitte podcast, or reading through some of the latest thinking from our world-class team at Deloitte Research, we view each as a unique opportunity to meet with you, share our latest thought leadership, and demonstrate the value of our 360-degree thinking.

Throughout the year, Deloitte releases publications, case studies, and points of view encompassing industry and functional trends and predictions. These publications, and more, are free and available to you online. View the sidebar on the right for a selection of our thought leadership.



Rich Doyle
Senior Manager,
National Investment Management
Investment Performance Services
Deloitte & Touche LLP
+1 617 437 3817
rdoyle@deloitte.com



Joseph Fisher
Partner,
National Investment Management
Audit Sector Leader
Deloitte & Touche LLP
+ 1 212 436 4630
josephfisher@deloitte.com

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.

Copyright © 2018 Deloitte Development LLC. All rights reserved.

Learn more

Deloitte Center for Financial Services

Change and increasing complexity are the new normal. Deloitte financial services professionals understand that your organization needs to not only adapt to these pressures, but also grow. The Deloitte Center for Financial Services provides timely insights on the most pressing issues facing the industry, helping keep your organization a step ahead. Through a mix of research, events, and insightful content, we offer an integrated view of financial services issues—tailored to what's important to you.

[▶ Learn more](#)

Closer Look Series

Take a closer look at what's happening in the financial services industry. Our Closer Look series provides quick insights on deep dive issues. Learn what's happening in the Investment Management, Banking & Securities, Insurance, and Real Estate markets in these short reads.

[▶ Learn more](#)

Investment Management Outlook

Several major trends will impact the investment management industry in the coming year. These include shifts in the buyer behavior as the Millennial generation becomes a greater force in the investing marketplace; increased regulation from the Securities and Exchange Commission; and the transformative effect that blockchain, robotic process automation, and other emerging technologies will have on the industry.

[▶ Learn more](#)

Dbriefs Webcasts

Learn more about the business and industry issues directly affecting the asset management industry in these one- to two-hour live webcasts created with executive-level audiences in mind. Dbriefs are interactive, convenient, and educational, with continuing professional education credit available for most live webcasts. View upcoming events, register, and listen to archived sessions of the Dbriefs webcast series.

[▶ Subscribe](#)

For more information, visit
www.deloitte.com/us/gips