30th Annual GIPS® Standards Conference

10-11 November 2026

Loews Philadelphia Hotel

Philadelphia, Pennsylvania, USA

The 30th anniversary conference will celebrate three decades of leadership, collaboration, and global impact across the investment industry. Connect with peers and gain valuable insights as leading industry and regulatory experts explore the latest trends in investment performance.

Information for all sessions

- **Delivery Method:** Group Live
- **Prerequisites:** General familiarity with the requirements of the 2020 Global Investment Performance Standards (GIPS®) for Firms
- **Attendance:** CPE Credits will be awarded for each session fully attended in person. If you attend all conference sessions in full, you can receive 12.8 total CPE:
    - 4.6 CPE in Regulatory Ethics
    - 3.0 CPE in Finance
    - 2.4 CPE in Information Technology
    - 1.8 CPE in Auditing - Technical
    - 1.0 CPE in Personal Development

  To comply with NASBA *Standards*, attendees claiming CPE credit must sign in to verify attendance for each segment. Attendance sign-in sheets will be available throughout the conference at the registration desk. You may make attendance updates at the desk as needed. A CPE Certificate of Completion will be provided via email shortly after the conclusion of the conference.
- **Advanced Preparation: None**
- Refund policy
- Complaints or concerns

Session Name: Verification in Focus: Trends, Challenges, and Opportunities

Learning Objective

Evaluate how technology, data management, alternative assets, regulatory developments, and recurring findings are influencing verification practices and client expectations.

Recommended CPE Credits and Field of Study

1.8 CPE; Field of Study: Auditing - Technical

Recommended CFA Institute Professional Learning (PL) Credits

1.5 PL credits (SER)

Program Level: Overview

Session Name: GIPS Standards Update

Learning Objective

Identify newly issued GIPS standards guidance, available tools and resources, and future technical projects that may affect implementation and compliance.

Recommended CPE Credits and Field of Study

1.2 CPE; Field of Study: Regulatory Ethics

Recommended CFA Institute Professional Learning (PL) Credits

1.0 PL credit (SER)

Program Level: Update

Session Name: Current State of SEC Examination

Learning Objective

Explain the SEC examination process and assess current examination priorities and findings related to the Marketing Rule, private fund fees and valuation, data governance, disclosure, and recordkeeping.

Recommended CPE Credits and Field of Study

1.2 CPE; Field of Study: Regulatory Ethics

Recommended CFA Institute Professional Learning (PL) Credits

1.0 PL credit (SER)

Program Level: Update

Session Name: Private Market Trends – Focus on Retailization

Learning Objective

Analyze the drivers and implications of expanding individual-investor access to private markets, including product structures, liquidity, valuation, investor protection, and emerging regulation.

Recommended CPE Credits and Field of Study

1.2 CPE; Field of Study: Finance

Recommended CFA Institute Professional Learning (PL) Credits

1.0 PL credit (General)

Program Level: Overview

Session Name: Asset Owner Perspectives on GIPS Compliance

Learning Objective

Assess practical approaches to achieving and maintaining GIPS compliance and explain how compliance can support governance, transparency, consistency, and confidence in performance reporting.

Recommended CPE Credits and Field of Study

1.0 CPE; Field of Study: Regulatory Ethics

Recommended CFA Institute Professional Learning (PL) Credits

1 PL credit (SER)

Program Level: Overview

Session Name: Stronger Advisor: Building Habits for High Performance

Learning Objective

Apply practical habits and intentional behaviors to improve productivity, communication, relationship-building, focus, resilience, and sustained professional effectiveness.

Recommended CPE Credits and Field of Study

1.0 CPE; Field of Study: Personal Development

Recommended CFA Institute Professional Learning (PL) Credits

1 PL credit (General)

Program Level: Overview

Session Name: Performance-based Fees: Calculation Challenges and Industry Practices

Learning Objective

Evaluate common performance-based fee structures, calculation challenges, governance practices, stakeholder responsibilities, and technology-enabled approaches to improving accuracy, consistency, and transparency.

Recommended CPE Credits and Field of Study

1.8 CPE; Field of Study: Finance

Recommended CFA Institute Professional Learning (PL) Credits

1.5 PL credits (General)

Program Level: Overview

Session Name: Putting AI to Work in Performance Measurement Analytics

Learning Objective

Apply AI and automation concepts to efficient frontier analysis, tracking-error decomposition, and attribution commentary while recognizing the need for human judgment, validation, and oversight.

Recommended CPE Credits and Field of Study

1.2 CPE; Field of Study: Information Technology

Recommended CFA Institute Professional Learning (PL) Credits

1.0 PL credit (General)

Program Level: Overview

Session Name: Intersection of AI with Performance Measurement and Reporting

Learning Objective

Assess practical uses of AI in performance measurement, analytics, and reporting, including implementation considerations, governance, oversight, risk management, and emerging best practices.

Recommended CPE Credits and Field of Study

1.2 CPE; Field of Study: Information Technology

Recommended CFA Institute Professional Learning (PL) Credits

1.0 PL credit (General)

Program Level: Overview

Session Name: GIPS Standards Help Desk

Learning Objective

Apply lessons from representative Help Desk questions to resolve common areas of confusion, recognize emerging industry issues, and improve application of the GIPS standards.

Recommended CPE Credits and Field of Study

1.2 CPE; Field of Study: Regulatory Ethics

Recommended CFA Institute Professional Learning (PL) Credits

1.0 PL credit (SER)

Program Level: Overview

For additional information on the 30th Annual GIPS® Standards Conference, please visit the conference webpage.

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