

# SUBJECT MATTER EXPERTS ON GIPS

## Panel Discussion on Most Frequently Asked Questions

Wednesday 4 November, 2015 at 16:00

Thomson Reuters, Václavské nám. 832/19, Prague 1 (entrance from Jindřišská)

### Speakers

#### GIPS Implementation Representatives

**John D. Simpson, CIPM** – Senior Vice President, West Coast Operations at The Spaulding Group

**Christian Jaeger, CFA** – Account Executive, Business Development at FirstRate

**Iain McAra, CFA** – Director, Global Investment Performance Standards, EMEA Region at CFA Institute

#### GIPS Compliant Company Representative

**Darren Crowley** – Head of Performance Analysis at Pictet Asset Management

### Schedule

16:00 Welcome Drink & Networking

16:30 GIPS Country Sponsors Welcome Remarks

**Luboš Vystavěl, CFA** – *Chairman of the GIPS Committee, Board Member of the CFA Society Czech Republic*

**Jana Michalíková** – *GIPS Committee Member, Executive Director of AKAT*

16:35 Panel Discussion on Most Frequently Asked Questions

17:30 Q&A

18:00 Short Walk to the Evening Networking Venue – Monarch, Na Perštýně 349/15, Prague 1

18:30 Wine-tasting & Networking at Monarch

**R.S.V.P.:** Gabriela Kolářová at [gabriela.kolarova@czechcfa.cz](mailto:gabriela.kolarova@czechcfa.cz) by **October 25, 2015**

Number of seats is limited.

Event Sponsors:



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# **MOST FREQUENTLY ASKED QUESTIONS**

1. What are the GIPS standards?
2. Who can and cannot claim compliance with GIPS?
3. What are the main reasons firms comply with GIPS?
4. What are the goals of GIPS?
5. How does GIPS benefit investment management firms?
6. How does GIPS benefit prospective clients?
7. What are the overall costs of implementing GIPS in your organisation?
8. Does it require any specific systems?
9. How long does it take to implement GIPS?
10. What are the major steps to establishing compliance with GIPS?
11. What is GIPS verification?
12. What is composite performance examination?
13. What information must be shown in a GIPS compliant presentation?