

GIPS Standards Workshop

Thursday, 25 May 2017 from 1 p.m.
Thomson Reuters

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

CFA Society Czech Republic together with AKAT ČR and Thomson Reuters bring you a unique workshop on Global Investment Performance Standards.

If you're looking to learn how to best apply the GIPS Standards or get the most out of them for your firm and clients, then this event is for you.

Event Schedule

- 1 pm Registration
- 1:15 pm Opening Remarks by CFA Society Czech Republic
- 1:30 pm **Performance Standards: Foundation of Investor Trust**
- This discusses the need and benefits of performance standards and introduces GIPS
 - Key statistics on GIPS acceptance worldwide
- 2:15 pm **Introduction to GIPS (aka GIPS 101)**
- 3 pm Refreshment Break
- 3:15 pm **GIPS & Marketing** (How to present data for a GIPS compliant firm)
- 4:00 pm **Intro to Basic Performance Calculations**
- Basic calculations for funds, and SMAs (equity and fixed income).
 - Timing of flows
 - Time weighted vs. money weighted
- 4:30 pm **Benchmarks**
- Characteristics of a good benchmark
 - Index calculations
 - Excess return calculations
- 5:00 pm Workshop Closes/ Networking Reception

RSVP

at: events@czechcfa.cz by May 14, 2017

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GIPS Standards Workshop

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Geoffrey is a Partner with Ashland Partners, an investment-specialist CPA firm, providing audit and consulting services to hedge funds, private equity and real estate firms, investment companies, and insurance companies. He manages approximately 70 client relationships, focusing on verifying investment advisors' claim of GIPS® compliance as well as other performance attestation engagements. Prior to joining Ashland Partners, Geoffrey was a Portfolio Analyst in the Performance Measurement Group of Fiduciary Trust Company International where he was responsible for institutional account performance and analytics. Currently, Geoffrey is located in Ashland's New York office and his client base includes firms in Europe, North America, South America, Africa and the Caribbean, which has given him the opportunity to work with a diverse set of investment managers. Geoffrey has earned a Certificate in Investment Performance Measurement (CIPM) from the CFA Institute. He received his undergraduate degree in Finance from the University of Delaware. He is a member of the CIPM Association.