



NOMINATIONS FORM
Global Investment Performance Standards (GIPS®) Canadian Investment Performance Council (CIPC)
Volunteers

Canadian Investment Performance Council Accepted as Country Sponsor of the Global Investment Performance Standards (GIPS®)

Local investment professional body to improve fair representation and full disclosure of investment performance in Canada

The Canadian Investment Performance Council (CIPC) was acknowledged as an official sponsor of the Global Investment Performance Standards, or GIPS® standards, for the Canadian market since 2008.

Based on the principles of fair representation and full disclosure, the GIPS standards provide a global, ethical framework for the calculation and presentation of investment performance for investment management firms. The GIPS standards benefit two main groups: 1) investment management firms and 2) their current and potential investing clients (including the investment consultants whose job is to evaluate, supervise, hire, and dismiss investment management firms on behalf of those clients).

Administered by CFA Institute Centre for Financial Market Integrity, the success of the GIPS standards is the result of an alliance of sponsors across Europe, North America, Asia-Pacific, and Africa. These key industry groups contribute significantly to promoting and developing the GIPS standards. The CIPC is the 29th group to join this alliance.

To view all groups involved in GIPS promotion and development, visit https://www.gipsstandards.org/about/Pages/country_sponsors.aspx.

“It is a great honor for our members to take on this challenge in Canada,” said Viviane Dorval, member of Canadian Investment Performance Council and Partner at Le Groupe Diapason Inc. “We are composed of highly knowledgeable professionals who are committed to supporting GIPS compliance in our country and promoting their use for the ultimate benefit of investors. We are definitely taking an active role internationally in the advancement of GIPS.”

Acting on the behalf of CFA Societies Canada, the role of CIPC is the promotion and advancement of GIPS in Canada and Internationally. CIPC reviews guidance statements issued by the GIPS governing body, collects feedback from the Canadian marketplace and forward any submissions to the Performance Standards Group in the CFA Centre for Financial Market Integrity.

“We are pleased to have the Canadian Investment Performance Council share this important role in promoting the GIPS standards in Canada,” said Stefan Illmer, chair of the GIPS Executive Committee and Director, Head of Client Reporting at Credit Suisse. “By becoming a country sponsor, the Canadian Investment Performance Council will advance the ongoing work to raise awareness of the GIPS standards. Their participation demonstrates a strong commitment to promoting global best practices.”

For more information about the GIPS standards, visit www.gipsstandards.org.

About the Canadian Investment Performance Council

The Canadian Investment Performance Council is a national initiative of the CFA Societies Canada who promote adherence to the highest standards of ethical behaviour, encourage professional development through the CFA Program and facilitates the open exchange of information and opinions.

The CIPC is currently recognized by the Global Investment Performance Standards (GIPS) Executive Committee as the official sponsor of the GIPS Standards for the Canadian market. The objective of the CIPC is to provide a Canadian perspective and to promote and advance the GIPS Standards in Canada.

About the GIPS Executive Committee

The GIPS Executive Committee (EC) is responsible for the strategic development, promotion, and implementation of the Global Investment Performance Standards (GIPS®). Their purpose is to promote the adoption and implementation of a single investment performance presentation standard throughout the world as the common method for calculating and presenting investment performance. The Executive Committee is a standing committee of CFA Institute and serves as the effective decision-making authority for the GIPS standards. The EC also utilizes the GIPS Technical Committee (TC) and other Subcommittees to involve all Country Sponsors and key stakeholders in the ongoing oversight of the Standards. Together they contribute to the development, maintenance, and promotion of the GIPS standards.

For further information, please contact:

Simon Filteau, CFA

Chair, Canadian Investment Performance Council at 1-514-847-5429



**Global Investment Performance Standards (GIPS®) Canadian Investment Performance Council (CIPC)
Member Nomination Form**

Part I – Administrative Details

Nominee Information

Name:

Title:

Employer:

Business Address:

Country:

Business Phone:

Business Fax:

E-Mail Address(es):

Professional Affiliations (Associations, local sponsors of performance standards, etc.):

Reference Information

Please provide the following information for two professional references. These references should be able to attest to your ethical standards and leadership skills. Preferably one reference should be involved with the GIPS standards.

Reference Name:

Address:

Telephone:

Fax:

Email:

Reference Name

Address:

Telephone:

Fax:

Email:

Part II – Competency

A. Experience/Qualifications

1. Are you currently working in the investment management industry dealing with investment performance measurement/calculation/evaluation? (Yes or No)
2. How much of your professional experience has dealt with investment performance measurement/calculation/evaluation? (Provide number of years and type(s) of experience)
3. Explain your experience in working with diverse groups and building consensus.
4. What level of involvement have you had in dealing with the GIPS standards?
5. What are your qualifying attributes to serve on the Canadian Investment Performance Council?

B. Commitment to the GIPS Standards

6. How do you support the objectives of the GIPS standards? Explain your reasons for support.
7. How would you intend to contribute to the objectives of the GIPS standards and the CIPC?
8. If you are selected as a CIPC member, would you have the support of your current employer? (Yes or No)
9. What do you think would be your greatest contribution to the Standards and the CIPC?

C. Communication

10. Have you published any articles or proceedings dealing with investment performance or the GIPS standards? Please provide a brief discussion of a recent article, including when it was published and the audience to which the article was targeted.
11. What experience, if any, you have had in presenting and explaining the GIPS standards and/or other investment performance related topics? Please provide details on the last two presentations, including the date given and size and type of audience.

Part III –Nominee’s additional comment

12. Please describe examples from your experience, which you consider are particularly pertinent to this application:
13. Please list your professional accomplishments: