



## Working group member: Exposure Draft of the 2020 GIPS

<b>No of member volunteers</b>	<b>Up to 8</b>
<b>Timeframe</b>	<b>Mid November 2018 to End December 2018</b>
<b>Commitment</b>	<b>20 hours</b>
<b>Reports to:</b>	<b>Professionalism steering committee</b>

As Leilani Hall, CFA, Co-Head of CFA Institute's Ethics, Standards & Professional Conduct explains [here](#) in this interview, GIPS need to adapt to keep pace with the continual evolution in global finance.

The CFA Institute is now mid-way through a program to overhaul GIPS which will see adoption planned for mid-2019 and an effective date of 1 January 2020. For periods ending after 31 December 2020, all GIPS reporting for Composites, Pooled Funds and Asset Owners must be prepared under 2020GIPS.

The CFA Institute is seeking input from all of its societies on the proposed changes and CFA UK is now setting up a working group to respond to the questions raised in the [Exposure Draft for 2020 GIPS](#).

Purpose and activity:

- Respond to the CFA Institute's GIPS team on questions they have raised of practitioners

Who are we looking for?

- Volunteers with knowledge of performance management reporting and GIPS
- Volunteers with experience of either Composite, Pooled Fund and Asset Owners reporting as under 2020GIPS these companies will have more clearly defined reporting rules
- Volunteers with a background involving performance reporting of alternative finance, real estate finance, private equity and derivative/overlay strategies - one of the key aims of 2020GIPS is to expand the amount of asset classes that may be reported on
- Volunteers keen to work in a group, but also willing to take delegated responsibility for components of the study

How CFA UK will help:

CFA UK will provide guidance, advice and will support the coordination of the work. We will provide editorial support, will make requests for information on the group's behalf and will work with the group to consider how best to bring members' and other stakeholders' views into the report and how best to share the report with them.

What you will gain:

- Volunteering brings a "shared experience" amongst peers that has long lasting benefits for your career
- An opportunity to get ahead of the curve and acquire an understanding of how and why GIPS is changing before it does!
- A role that builds your profile within the CFA UK network of volunteers, the wider membership, the CFA Institute and the industry
- Development of your leadership, communication and team-work skills
- Recognition for your expertise in an increasingly important field
- A chance to meet and network with other like-minded investment professionals

If you are interested in applying for this opportunity, please download the Volunteer Application form and return it along with a copy of your CV to [volunteer@cfauk.org](mailto:volunteer@cfauk.org)

**Deadline [for applications]:** 14 November, 2018