

GIPS Services

The investment management industry is faced with increased scrutiny from all its stakeholders. One of this sector's pressing needs is adoption of the right processes, procedures and controls to ensure that reported and marketed performance figures are represented accurately and in a timely fashion. That's where GIPS® Standards prove beneficial.

What are the GIPS® Standards?

The GIPS® Standards are a set of standardized, industry-wide ethical principles that provide investment firms with guidance on how to calculate and report their investment results to prospective clients.

While achieving GIPS® standards is voluntary, managers that comply with industry best practices and promote validated historical performance data build credibility with investors and are viewed as a trustworthy source. **GIPS® are now being sponsored and promoted in over 30 countries.**

According to the CFA Institute that created and administers GIPS®, the firms that comply with the GIPS® typically benefit from being able to compete for global business and also identify important internal processes and workflows.

“Investment Performance Reporting has evolved from being an Obligation to a Differentiator”.

Some firms have never claimed compliance and are starting from scratch, while other firms are just looking to tighten up or update their GIPS policies. Finnovative can assist in either starting the compliance framework or fine tuning it.

Benefits to Investment Firms

- Create a higher degree of assurance in prospective clients minds about the rigors of your performance measurement and reporting
- Compete for global business by making your performance presentations comparable
- Identify operational/workflow improvements

Offerings:

Advisory, Assessment and Guidance

- Helps you plan and understand the benefits and the process of GIPS Compliance
- Ensure that the necessary data/workflow/process/documentation infrastructure is present

Implementation

- Build compliant performance presentation and reporting
- Provide an in-house or outsourced technology solution as appropriate

Verification

- Ensure that the GIPS compliance has been met firm-wide
- Identify areas that may need improvement

Maintenance

- Maintain on-going compliance as required for continued GIPS compliance
- Prepare for upcoming and future GIPS changes

About Finnovative, Inc.

Finnovative, Inc. founded in 1995 is a full service solution provider addressing the specific needs of the entire spectrum of participants in the investment management industry.

Our team of industry professionals combines expertise in global markets, GIPS, research and analytics, trading and operations, technology, client service, and support.

Value to you:

- ✓ **Access to expert-level knowledge and our 15-year track record**
- ✓ **Services officially recognized on GIPS® website**
- ✓ **One-stop solution for all your GIPS and performance reporting related needs**

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