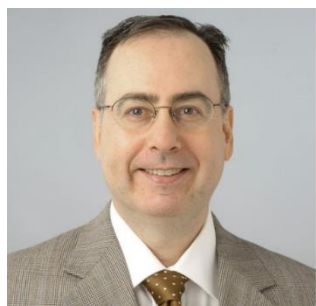


## 2020 GIPS STANDARDS: WHY BE COMPLIANT AND HOW TO ADOPT WEBINAR 26 MAY

As of January 1, 2020, the new version of the Global Investment Performance Standards (GIPS®) standards have come into effect. The GIPS standards have been adopted by over 1,700 organizations in over 46 markets around the world and have been updated to enhance their application to all asset classes, to better address pooled funds and to consolidate guidance issued since the 2010 version was released. Given the importance of the GIPS standards to market integrity, many organizations in the investment industry, including asset owners, asset managers, consultants, regulators, law firms, recordkeepers, software providers, consultants, and accounting firms, should be interested in learning about the 2020 GIPS standards.

Please join us to learn more about the 2020 GIPS standards.

### MODERATOR



**Ken Robinson, CFA, CIPM, CPA, PFS**  
**CFA Institute**  
**Director, Global Industry Standards**

Mr. Robinson is a Director in the Global Industry Standards team at CFA Institute. Mr. Robinson helps maintain the GIPS standards through management of the interpretations process, developing guidance for new technical areas, working extensively with volunteer committees, promulgating the GIPS standards and serving as a thought leader. Prior to joining CFA Institute, Mr. Robinson was a director in the investment management audit practice at PricewaterhouseCoopers LLP. Mr. Robinson is a member of the Performance Measurement

Committee of NCREIF and the GIPS Task Force of the NCREIF PREA Reporting Standards. Mr. Robinson has served as an appointed member of the North American Investment Performance Committee of CFA Institute, the Interpretations Subcommittee of the GIPS Executive Committee, the Quantitative Investing Subcommittee of CFA Society Boston, and the Investment Performance Standards Task Force of the AICPA. Mr. Robinson holds a Bachelor of Science degree in finance from Indiana University.

### PANELISTS



**Simon Filteau, CFA**  
**Caisse de dépôt et placement du Québec**  
**Vice president, Valuation and Performance**

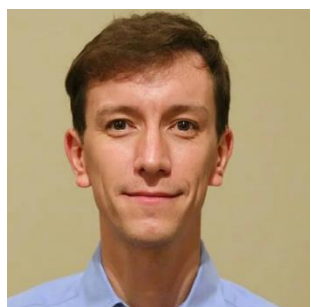
Simon is a CFA® charterholder and holds the position of Vice president, Valuation and Performance at CDPQ. In this role, he leads the teams responsible for portfolio valuation across private asset classes, performance attribution and communication on a global fund level, GIPS compliant reporting and benchmarks management. Simon is Chair of the Canadian Investment Performance Council and an active member since 2016.



**Patrick Fontaine, CIPM**  
**Fiera Capital**  
**Process Lead, Investment Analytics**

Patrick Fontaine, CIPM Patrick has served on the CIPC since June 2018. Patrick is a CIPM charterholder and holds the position of Process Lead, Investment Analytics at Fiera Capital Corporation. In this role, he leads teams covering performance measurement, risk and valuation and is responsible for maintaining quality and respect of service level agreement (SLA). He is also in charge of the annual audit for GIPS certification and acts as a project leader on different projects. Prior to joining Fiera, Patrick was financial analyst for Laval

University Pension Fund from 2007 to 2011. Patrick received his CIPM designation and graduated with a B.A. in finance from Laval University.



**Emil Vassenine, CIPM**  
**EVIV Group Inc.**  
**Principal and President**

Emil is the Principal and President of EVIV Group Inc., Canada's largest GIPS consulting and verification firm. His firm's strength lies in its unique custom approach to each client's circumstances and its commitment to resolve challenges to client success. Emil has over 13 years of industry experience. Before founding EVIV Group in 2012, he worked as a Performance and GIPS Specialist at Sionna Investment Managers. Emil has a master's degree in Economics & Management, has also earned a Certificate in Investment Performance

Measurement (CIPM) from the CFA Institute and the Chartered Investment Manager (CIM) designation from the Canadian Securities Institute.