

GIPS Standards for FMPs

Compliance Notification Form

Once a Fiduciary Management Provider meets the requirements of the GIPS standards for FMPs, it must complete and submit the form below.

CFA Institute gathers and protects information in accordance with our [Privacy Policy](#).

Fields marked with an asterisk (*) are optional.

Contact 1

Prefix

Given Name/First Name

Family Name/Last Name

Job Title

Role This contact is responsible for compliance or is in a senior role.

Email Address

Phone Number

Contact 2

Prefix

Given Name/First Name

Family Name/Last Name

Job Title

Role This contact is responsible for compliance or is in a senior role.

Email Address

Phone Number

FMP Information

FMP Name

FMP website (include URL)

Can CFA Institute display your
FMP name on the website?

Please provide your FMP definition

FMP Address

Country / Region

Business / Building*

Address Line 1

Address Line 2*

City

Region/Province*

Postal Code

FMP Assets

Indicate the FMP Assets in **(£ billions)** as of
the most recent calendar year-end*