

## GIPS Standards Service Providers

August 2020

Service providers are available to assist your organization with attaining and maintaining compliance with the GIPS standards. The following service providers have contacted CFA Institute and requested that they be listed as a resource. This list is not an endorsement by CFA Institute of the companies or the services or products they provide.

The content included herein is for informational purposes only. You should not construe any such information or other material as legal, tax, investment, financial, or other advice. You alone assume the sole responsibility for evaluating the merits and risks associated with the use of any information or other content herein before making any decisions based on such information or other content. You agree not to hold CFA Institute or its subsidiaries liable for any possible claim arising from any decision you make based on information or content made available to you herein.

### Verifiers

Firm	Location	Contact	Email
Absolute Performance Verification	USA	Leisa Western	<a href="mailto:leisa@absoluteverification.com">leisa@absoluteverification.com</a>
ACA Performance Services	USA	Brigitte Nickel	<a href="mailto:bnickel@acacompliancegroup.com">bnickel@acacompliancegroup.com</a>
Alpha Performance Verification Services	USA	Michael Hultzapple	<a href="mailto:mike@alphaverification.com">mike@alphaverification.com</a>
Assurance Accounting Group, LLC	USA	Jason Millard	<a href="mailto:jason@aacctgroup.com">jason@aacctgroup.com</a>
Cairn Investment Performance Consulting	USA	Erik Johnsen	<a href="mailto:eric@cairnipc.com">eric@cairnipc.com</a>
Cascade Investment Compliance	USA	Kim Cash	<a href="mailto:Kim.cash@cascadecompliance.com">Kim.cash@cascadecompliance.com</a>
Cohen & Company	USA	Lindsay Selick	<a href="mailto:lselick@cohen CPA.com">lselick@cohen CPA.com</a>
Dabney Investment Consulting Associates, Inc.	USA	Joseph Dabney	<a href="mailto:joedabney@dabneyinvestmentconsulting.com">joedabney@dabneyinvestmentconsulting.com</a>
Deloitte	France	Ophelie Peypoux	<a href="mailto:opeypoux@deloitte.fr">opeypoux@deloitte.fr</a>
Deloitte	Mexico	Alejandro Ibarra	<a href="mailto:aibarracondes@deloittemx.com">aibarracondes@deloittemx.com</a>
Deloitte	USA	Brenda Di Leo	<a href="mailto:bdileo@deloitte.com">bdileo@deloitte.com</a>
EisnerAmper LLP	USA	Andrew Halperin	<a href="mailto:andrew.halperin@eisneramper.com">andrew.halperin@eisneramper.com</a>
Ernst & Young	Finland	Janne Aalto	<a href="mailto:Janne.aalto@fi.ey.com">Janne.aalto@fi.ey.com</a>
Ernst & Young	Hong Kong	Alpha Tsang	<a href="mailto:Alpha.tsang@hk.ey.com">Alpha.tsang@hk.ey.com</a>

Firm	Location	Contact	Email
Ernst & Young	Singapore	Lucretia Aik	<a href="mailto:Lucretia.aik@sg.ey.com">Lucretia.aik@sg.ey.com</a>
Ernst & Young	Switzerland	Susanne Klemm	<a href="mailto:Susanne.klemm@ch.ey.com">Susanne.klemm@ch.ey.com</a>
Ernst & Young	Taipei	Charlie Hsieh	<a href="mailto:Charlie.Hsieh@tw.ey.com">Charlie.Hsieh@tw.ey.com</a>
Ernst & Young	United Kingdom	Mike Gaylor	<a href="mailto:performanceverification@uk.ey.com">performanceverification@uk.ey.com</a>
EVIV Group Inc.	Canada	Emil Vassenine	<a href="mailto:emil@evivgroup.com">emil@evivgroup.com</a>
Fairview Performance Services	USA	Greta Nathan	<a href="mailto:Greta.nathan@fairviewperformance.com">Greta.nathan@fairviewperformance.com</a>
Frankfurt Finance Audit	Germany	Martin Schleimann	<a href="mailto:mschliemann@frankfurtfinanceaudit.de">mschliemann@frankfurtfinanceaudit.de</a>
Greenwich Analytics	USA	Sanjay Chandiramani	<a href="mailto:sanjay@greenwichbeta.com">sanjay@greenwichbeta.com</a>
Kings Thrones Limited	Nigeria	Akin Adeniyi	<a href="mailto:ccare@kingsthronesng.com">ccare@kingsthronesng.com</a>
KPMG	USA	Dan Strasshofer, Jr.	<a href="mailto:dstrasshofer@kpmg.com">dstrasshofer@kpmg.com</a>
Kreischer Miller	USA	Thomas Peters	<a href="mailto:tpeters@kmco.com">tpeters@kmco.com</a>
Mashurah	Saudi Arabia	Ghadah Mazi	<a href="mailto:info@mashurah.com.sa">info@mashurah.com.sa</a>
PwC	Singapore	Armin Choksey	<a href="mailto:Armin.p.choksey@pwc.com">Armin.p.choksey@pwc.com</a>
PwC	Switzerland	Dimitri Senik	<a href="mailto:dimitri.senik@ch.pwc.com">dimitri.senik@ch.pwc.com</a>
PwC	Taipei	Ellen Kuo	<a href="mailto:ellen.kuo@pwc.com">ellen.kuo@pwc.com</a>
PwC	USA	Matthew Ward	<a href="mailto:matthew.e.ward@pwc.com">matthew.e.ward@pwc.com</a>
The Spaulding Group, Inc.	USA	Chris Spaulding	<a href="mailto:cspaulding@spauldinggrp.com">cspaulding@spauldinggrp.com</a>
Synercate	Ghana	Ivy Hesse	<a href="mailto:ivyhesse@synercate.com">ivyhesse@synercate.com</a>

**Consultants – Please note that most verifiers also offer consulting services. See Verifiers list above.**

Firm	Location	Contact	Email
Basis Point Solutions	USA	Jonathan Boersma	<a href="mailto:info@basispointsolutions.com">info@basispointsolutions.com</a>
First Composite	Canada	Justin Taheri	<a href="mailto:justin@firstcomposite.com">justin@firstcomposite.com</a>
Guardian Performance Solutions	USA	Amy Jones	<a href="mailto:amy@compliantperformance.com">amy@compliantperformance.com</a>
Kyza Performance Consulting, LLP	USA	Debi Rossi	<a href="mailto:Debi.rossi@kызaperformance.com">Debi.rossi@kызaperformance.com</a>
Latitudes Conseil & Recherche	France	Jean-Francois Bouilly	<a href="mailto:jfbouilly@latitudes_cr.com">jfbouilly@latitudes_cr.com</a>
Longs Peak Advisory Services, LLC	USA	Sean Gilligan	<a href="mailto:sean@longspeakadvisory.com">sean@longspeakadvisory.com</a>
Performance Measurement Solutions	USA	Craig Horvath	<a href="mailto:craig@performancemeasurementsolutions.com">craig@performancemeasurementsolutions.com</a>

## Software/Technology/Other

Firm	Service Description	Location	Contact	Email
BNY Mellon, Data and Analytics Solutions – Eagle Investment Systems	Composite Management Software	USA	Nathan Montgomery	<a href="mailto:nathan.montgomery@bnymellon.com">nathan.montgomery@bnymellon.com</a>
Cairn Investment Performance Consulting	Performance Software	USA	Erik Johnsen	<a href="mailto:erik@cairnipc.com">erik@cairnipc.com</a>
CAPS, Inc.	Composite Management Software	USA	David Yuska	<a href="mailto:info@capisinc.com">info@capisinc.com</a>
Confluence/Statpro	Performance Software	Global	Gary Casagrande	<a href="mailto:gcasagrande@confluence.com">gcasagrande@confluence.com</a>
FactSet Research Systems	Composite Management Software	Global	Sean Murray	<a href="mailto:sean.murray@factset.com">sean.murray@factset.com</a>
John Norwood Consulting, LLC	Composite Management Software	USA	John Norwood	<a href="mailto:John.norwood@norwood-consulting.com">John.norwood@norwood-consulting.com</a>
Kings Thrones Limited	Performance Evaluation Software	Nigeria	Akin Adeniyi	<a href="mailto:ccare@kingsthronesng.com">ccare@kingsthronesng.com</a>
Markov Processes International	Performance Evaluation Software	USA	Michael Markov	<a href="mailto:info@markovprocesses.com">info@markovprocesses.com</a>
Opturo	Composite Management Software	Ireland	Andre Mirabelli	<a href="mailto:amirabelli@opturo.com">amirabelli@opturo.com</a>
SS&C Advent	Performance Software	USA	Matt Ahlstrand	<a href="mailto:mahlstra@sscinc.com">mahlstra@sscinc.com</a>

### To be Included in This List

If your company wishes to be listed as a GIPS standards service provider, please email us at [standards@cfainstitute.org](mailto:standards@cfainstitute.org).