

Our Co-Sponsors

BNY Mellon is a global investments company dedicated to helping its clients manage and service their financial assets throughout the investment lifecycle. Whether providing financial services for institutions, corporations or individual investors, BNY Mellon delivers informed investment and wealth management and investment services in 35 countries. As of Dec. 31, 2021, BNY Mellon had \$46.7 trillion in assets under custody and/or administration, and \$2.4 trillion in assets under management. BNY Mellon can act as a single point of contact for clients looking to create, trade, hold, manage, service, distribute or restructure investments. BNY Mellon is the corporate brand of The Bank of New York Mellon Corporation (NYSE: BK). Additional information is available on www.bnymellon.com. Follow us on Twitter @BNYMellon or visit our newsroom at www.bnymellon.com/newsroom for the latest company news.

John Norwood Consulting is the producer of CompositeBuilder, a powerful composite management system designed to help firms efficiently achieve and maintain GIPS® compliance. CompositeBuilder provides rule-governed automation for composite construction and maintenance, comprehensive error checking, outlier analysis, and a one-click export of data required for verification. Built-in reporting will generate annual compliant presentations. Monthly, quarterly, and multi-year reporting options are available with a broad universe of ex-post return and risk analytics, along with a variety of easily customized graphical presentations.

Kreischer Miller is an accounting, tax, and business advisory firm that has been serving clients since 1975. Our experienced professionals proactively identify and solve problems, and reduce risk by addressing issues before they are caught by regulators. We also offer ideas on ways to operate more efficiently and provide insight into how other firms handle issues. Kreischer Miller's Investment Industry Group provides the following services for investment managers, funds, broker-dealers, and investors:

- GIPS compliance
- Operational due diligence
- Compliance and consulting
- Financial statement audits
- Tax strategies

Longs Peak Advisory Services was established to provide members of the investment community with guidance, education, and support relating to GIPS compliance and investment performance measurement, analysis, and reporting. We have extensive experience helping firms become GIPS compliant as well as maintain their compliance with the GIPS standards on an ongoing basis. Our team has worked with hundreds of firms of varying sizes across North America, Europe, the Middle East, and Asia and we understand the unique needs and challenges firms face.

Meradia specializes in strategic advisory and implementation services for the global investment management industry. Since 1997, Meradia has provided independent, pragmatic consulting services that transform investment management processes, analytics and reporting. We align front-, middle-, and back-office organizations and technical platforms with your business's direction and vision. Our team leverages decades of experience in financial services to lead your most pressing investment operations and technology transformation projects. Solving business challenges, including strategic assessment, workflow optimization, vendor selection, and system implementation – our clients depend on us for a complete solution.

Rimes provides transformative data management and investment intelligence solutions to the world's leading investors and asset managers. Driven by our passion for solving the most complex data problems, we partner with our clients to help them make better investment decisions using accurate information and industry-leading technology. Headquartered in New York and London, Rimes serves its global clients through offices in Europe, Americas and Asia Pacific. www.rimes.com

Robust Technologies offers best-in-class software for performance measurement, performance attribution, benchmark customization, risk analytics and GIPS Composites. Renowned for its calculation methodologies, our software produces meaningful and accurate results no matter how complex your investment management strategies may be.

TSG The Spaulding Group, Inc. was founded in 1990 by David Spaulding. In 2023, the company was rebranded as TSG. TSG is the institutionally recognized boutique performance measurement consulting and GIPS standards specialist firm serving the investment industry. Focused on investment performance measurement, we support organizations all over the world through a variety of services, including GIPS verification, performance certification, consulting, training, conferences, interactive forums, research, and publishing.