

# Client Reporting Standards



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# **DID YOU KNOW ?**

## **CFAI Worked on reporting standards**





WOULD YOU  
WHAT DO YOU  
WANT



# WHAT WOULD YOU WANT?

- **Address frequency of reporting?**
- **What to include?**
- **Periodicity of information?**
- **Flexibility / customizability of reports?**
- **Standards, guidelines, best practices?**
- **Anything else?**



# Frequency

- **Monthly, quarterly, annually?**
- **On demand?**
- **Will reports vary, based on frequency?**

# What to Include

- **IRR, TWR?**
- **Ex-post risk measures?**
- **Ex-ante risk measures?**
- **Attribution?**

# Periodicity

- **YTD, MTD, WTD, ITD, Point-to-Point**
- **Daily, monthly, annual**
- **Rolling periods**

# Flexibility/Customizability

- **How flexible or customizable should reports be?**
- **Might this vary depending on the size of the client?**



# Standards, guidelines, best practices

- **Do we need another set of standards?**
- **Would it come with the suggestion to get verified?**
- **If best practices, who gets to decide what best practices are?**

# Anything Else?

- **What might that be?**
- **Delivery method?**
- **Currency to use?**
- **Explanations of terms or statistics?**
- **Font sizes?**

# Summary

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*If we were to have standards, there's a great deal to consider*







# LET'S DISCUSS!

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