



Basis Point Solutions

Premiere provider of independent performance and GIPS compliance consulting

Performance is the essence of investment management.

*It is what is sold,
what investors buy,
and is the basis for evaluation.*

At the end of the day, it all comes down to basis points.

Customized Performance and Compliance Consulting

Basis Point Solutions (BPS) can help you with all of your performance, GIPS, and Asset Manager Code compliance needs. We help firms that are pursuing compliance for the first time and compliant firms facing new challenges. From policies and procedures to composites and calculations, BPS can help you achieve your goals.



Training

Compliance is not a one-time event, but rather an on-going process that necessitates continuous training. We have trained hundreds of regulators, asset managers, and asset owners around the world and offer highly customized and interactive training. Whether it is basic training for new employees or in-depth training for experienced personnel, BPS can help your team excel.

Subject Matter Expertise

The preeminent global authority on the GIPS standards and the Asset Manager Code is now available when you need subject matter expertise. No one in the world has more experience developing, managing, interpreting, and authoring the standards. BPS can bring clarity to the grey areas. When you need the best, call on BPS.





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Jonathan A. Boersma, CFA
Founder and CEO

Mr. Boersma established Basis Point Solutions in 2017 after leading the CFA Institute ethics and performance standards group for 17 years. Most recently Mr. Boersma served as Head of Professional Standards and Executive Director of the Global Investment Performance Standards (GIPS®) and was responsible for the oversight of all aspects of the CFA Institute Professional Standards, which includes, among others, the CFA Institute Code of Ethics and Standards of Professional Conduct, the GIPS standards, the Asset Manager Code of Professional Conduct, the Pension Trustee Code, and the ethical decision-making offerings. He was responsible for creating solutions and practices to improve the integrity and ethical practices within the financial services industry. For more than a decade, Mr. Boersma served as the Executive Director of the GIPS standards where he led the development of the 2010 edition of the GIPS standards, paved the way for asset owners to adopt the standards, and created the vision and strategy for the GIPS 2020 initiative. He served as a member of the GIPS Technical Committee and the GIPS Executive Committee.

Mr. Boersma is a frequent speaker on ethics in the investment industry, is often quoted in the financial press, and has appeared on CNN, CNBC, ABC World News, and PBS, as well as financial news programs in Australia, Hong Kong, and the Philippines. Mr. Boersma testified before the United States Senate Judiciary Committee on the need for independence between investment analysts, hedge funds, and corporate issuers. He has been a featured speaker at more than one hundred conferences and events and has conducted training for some of the worlds largest pension funds, investment management firms, and regulators.

Prior to joining CFA Institute, Mr. Boersma held a broad range of positions in the investment management industry including portfolio management, trading, and performance and risk analysis. He serves as a member of the Covenant School (Charlottesville, VA) board of directors, where he chairs the finance committee, is a member of the executive committee, and serves as chairman of the Covenant Endowment Fund. Mr. Boersma earned a Bachelor of Science degree in Economics from the University of Wisconsin and is a CFA charterholder. Mr. Boersma was the 2014 winner of the Portfolio Institutionell (www.portfolio-institutionell.de) Reader's Choice Award for Industry Achievement.

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