



## **Chief Operating Officer Center ("COO Center") Supported by Investment Business Advisors, LLC**

Providing "Best Practice" Advice to Alternative Firm CEOs, CIOs, COOs, CFOs and Functional Heads

### **"Best Practice" Publications/Links**

#### **Presidents Working Group on Financial Markets (PWG) Washington, DC**

- Principles and Best Practices for Hedge Fund Investors", January 15, 2009:  
[http://www.hedgefundinsurance.com/Publications/Principles%20and%20Best%20Practices%20for%20Hedge%20Fund%20Investors\\_IC%20Report.pdf](http://www.hedgefundinsurance.com/Publications/Principles%20and%20Best%20Practices%20for%20Hedge%20Fund%20Investors_IC%20Report.pdf)

#### **Institutional Limited Partners Association (ILPA), Toronto, ON, Canada <http://ilpa.org/ilpa-private-equity-principles/>**

- "Updated Private Equity Principles", Updated January 2011
- "First Standardized Reporting Template", January 2011

#### **Managed Fund Association (MFA), Washington, DC [www.managedfunds.org/wp-content/uploads/2011/06/Final\\_2009\\_complete.pdf](http://www.managedfunds.org/wp-content/uploads/2011/06/Final_2009_complete.pdf)**

- "Sound Practices for Hedge Fund Managers", 5th edition, March, 2009:

#### **Alternative Investment Management Association (AIMA), London [www.aima.org/en/education/aima-guides.cfm](http://www.aima.org/en/education/aima-guides.cfm)**

- "Guide To Institutional Investors' Views and Preferences Regarding Hedge Fund Operational Structures"
- "Guide To Sound Practices for European Hedge Fund Managers"
- "AIMA's Guide To Sound Practices for Hedge Fund Valuation"

#### **Greenwich Roundtable, Greenwich, CT [www.greenwichroundtable.org/best-practices](http://www.greenwichroundtable.org/best-practices)**

- "Best Governance for Investment Committees" 2014
- "Best Practices in Alternative Investing: Avoiding Mistakes", 2012
- "Best Practices in Alternative Investing: Managing Complexity", 2011
- "Best Practices in Alternative Investments: Due Diligence", 2010
- "Best Practices in Alternative Investing: Portfolio Construction", 2009
- "Best Practices in Hedge Fund Investing: Due Diligence for Fixed Income and Credit Strategies", Spring 2007
- "Best Practices in Hedge Fund Investing: Due Diligence for Global Macro and Managed Futures Strategies", Winter 2006
- "Best Practices in Hedge Fund Investing: Due Diligence for Equity Strategies", Spring 2005

#### **Hedge Funds Standards Board (HFSB), London: "The Hedge Fund Standards", February, 2012 <http://www.hfsb.org/?section=12512>**

#### **Alignment of Interests Association (AOI): "AOI Hedge Fund Principles 2014": [www.altaoi.org/principles](http://www.altaoi.org/principles)**

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