

The Cortex Report

Customized for the

San José Retirement Boards

January 2025

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Introduction to The Cortex Report

Welcome to **The Cortex Report**, a bi-monthly publication that has been customized for your board. The Cortex Report identifies various conferences, seminars, courses and other education events over the coming months that may be of value to trustees and staff.

Education events are sorted in chronological order, and include information such as event name, event sponsor/provider, date, topic areas, fees, and a general description. Each event listing also contains a link to the event sponsor's website. If you are interested in attending an education event, please be sure to check the sponsor's website for complete details.

Please also note the terms and conditions for use of this report at the end of the report.

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Table of Contents

Start Date	Primary Organizer	Event	Location	Page	
Jan 27, 2025	National Conference on Public Employee Retirement Systems (NCPERS)	Legislative Conference	Washington, District of	1	
Jan 27, 2025	International Foundation of Employee Benefit Plans (IFEBP)	Annual Health Benefits Conference & Expo	St. Pete Beach, Florida	1	<i>New</i>
Jan 27, 2025	Institutional Real Estate, Inc. (IREI)	2025 Visions, Insights & Perspectives (VIP) Americas	Carlsbad, California	2	
Feb 02, 2025	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia, Pennsylvania	2	
Feb 26, 2025	International Foundation of Employee Benefit Plans (IFEBP)	Certificate Series - Investment Basics	San Diego, California	3	<i>New</i>
Feb 28, 2025	International Foundation of Employee Benefit Plans (IFEBP)	Certificate Series - Retirement Plan Basics	San Diego, California	3	<i>New</i>
Mar 01, 2025	National Association of State Retirement Administrators (NASRA)	Winter Meeting	Washington, District of	4	
Mar 02, 2025	California Association of Public Retirement Systems (CALAPRS)	General Assembly	Napa, California	4	
Mar 03, 2025	National Institute on Retirement Security (NIRS)	Annual Conference	Washington, District of	5	<i>New</i>
Mar 04, 2025	Principles for Responsible Investment (PRI)	Responsible Investment Forum	New York, New York	5	
Mar 10, 2025	Council of Institutional Investors	Spring Conference	Washington, District of	6	
Mar 24, 2025	Pension Bridge	Pension Bridge Annual	San Francisco, California	6	
Mar 26, 2025	Pension Real Estate Association (PREA)	PREA Spring Conference	Dallas, Texas	7	
Apr 16, 2025	Pensions & Investments	Private Markets	Chicago, Illinois	7	
Apr 28, 2025	International Foundation of Employee Benefit Plans (IFEBP)	Health Care Management Conference	Fort Myers, Florida	8	
Apr 30, 2025	Plan Sponsor	Plan Sponsor National Conference	Las Vegas, Nevada	8	
May 04, 2025	CFA Institute	Annual Conference	Chicago, Illinois	9	<i>New</i>
May 13, 2025	State Association of County Retirement Systems (SACRS)	Spring Conference	Los Angeles, California	9	
May 13, 2025	Institutional Investor	Redefining Fixed Income Forum	Chicago, Illinois	10	
May 17, 2025	National Conference on Public Employee Retirement Systems (NCPERS)	Trustee Education Seminar	Denver, Colorado	10	
May 17, 2025	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	Denver, Colorado	11	
May 18, 2025	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference and Exhibition	Denver, Colorado	11	
May 19, 2025	International Foundation of Employee Benefit Plans (IFEBP)	Washington Legislative Update	Washington, District of	12	
May 19, 2025	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia, Pennsylvania	12	<i>New</i>
Jun 23, 2025	International Foundation of Employee Benefit Plans (IFEBP)	Advanced Trustees and Administrators Institute	Nashville, Tennessee	13	

Table of Contents

Start Date	Primary Organizer	Event	Location	Page	
Jun 29, 2025	Government Finance Officers Association (GFOA)	Annual Conference	Washington, District of	13	
Jul 13, 2025	State Association of County Retirement Systems (SACRS)	Public Pension Investment Management Program	Berkeley, California	14	
Jul 15, 2025	Pension Bridge	Private Equity Exclusive	Chicago, Illinois	14	
Jul 16, 2025	International Foundation of Employee Benefit Plans (IFEBC)	Certificate Series - Intro to Public Sector Benefits Administration	Chicago, Illinois	15	<i>New</i>
Jul 17, 2025	International Corporate Governance Network (ICGN)	Annual Conference	New York, New York	15	
Aug 09, 2025	National Association of State Retirement Administrators (NASRA)	Annual Conference	Seattle, Washington	16	
Sep 08, 2025	Council of Institutional Investors	Fall Conference	San Francisco, California	16	
Sep 14, 2025	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia, Pennsylvania	2	<i>New</i>
Oct 05, 2025	International Centre for Pension Management (ICPM)	Discussion Forum	San Francisco, California	17	
Oct 20, 2025	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia, Pennsylvania	12	<i>New</i>
Oct 22, 2025	Harvard Kennedy School	Investment Decisions and Behavioral Finance	Cambridge, Massachusetts	17	<i>New</i>
Oct 22, 2025	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Boston, Massachusetts	18	
Oct 26, 2025	National Conference on Public Employee Retirement Systems (NCPERS)	NCPERS Fall Conference	Tampa, Florida	18	<i>New</i>
Nov 11, 2025	State Association of County Retirement Systems (SACRS)	Fall Conference	Los Angeles, California	19	<i>New</i>
Nov 16, 2025	Harvard Business School	Audit Committees in a New Era of Governance	Boston, Massachusetts	19	<i>New</i>

Event Listings

Conference : Legislative Conference

Start Date: January 27, 2025

Organizer: National Conference on Public Employee Retirement Systems

End Date: January 29, 2025

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Legislation

Attendance: Members Only

This is a conference for public fund trustees and plan administrators, highlighting the issues on Capitol Hill and in federal regulatory agencies that affect pension funds today. Past conferences have brought senior administration officials, Members of Congress and Washington insiders to help educate fund members on the critical issues affecting public pensions and equip them with the tools needed to deal with these issues effectively and meet-face-to-face with their elected leaders on the Hill.

Please check the website for more information as it becomes available.

Fees

ServiceProviderMember\$1050
Please see the website for all registration options.
Early bird discount of \$200 for registration by Jan 5 '25.

Contact

Alyssa Carlson
Phone: 202-624-1456
Fax: 202-624-1439

Email

registration@ncpers.org

Link: <https://www.ncpers.org/legislative-conference>

Conference : Annual Health Benefits Conference & Expo

Start Date: January 27, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: January 29, 2025

Location: St. Pete Beach, Florida

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Healthcare Management

Attendance: Open To All

HBCE is one of the nation's premier sources for employee health benefits and wellness education. In times of change, having real-life examples and proven solutions is paramount to help guide your decision making. Addressing current topics revolving around cost-containment strategies, compliance initiatives and population health management, this program is a vital part of health benefits and wellness planning. Join your peers to get the latest updates and information that can make a positive impact on your organization.

For more information, visit the website.

Fees

Corporate Rate: \$750
Service Provider: \$850
Early Bird discount: \$300 before Dec. 17, 2024 - Visit the website for more options.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education---events/educational-program-schedule/health-benefits-conference-and-expo/event-home>

Conference : 2025 Visions, Insights & Perspectives (VIP) Americas

Start Date: January 27, 2025

Organizer: Institutional Real Estate, Inc. (IREI)

End Date: January 29, 2025

Location: Carlsbad, California

Alternative Date(s) & Location(s) N/A

Difficulty: Practitioner

Topic Area: Investments

Attendance: By Invitation Only

VIP delivers a quality agenda that is marketing-free. It upholds a strict ratio of 3 managers to every 1 investor. This ensures that attendees are able to really engage and get to know one another. Our audience is also capped so that the event is kept at a size that fosters relationship building. During the event there are several opportunities to socialize with attendees. Whether you are discussing critical industry issues as a part of a roundtable breakout session or at an off-site recreational activity, VIP gives you an excellent networking platform to establish new relationships and strengthen existing.

Registration is open to qualified investors and subscribers to the Institutional Real Estate Americas publication. To find out more details about registration and the publication, please contact the organizer.

Fees

Not available. Please contact conference organizer.

Contact

Lucero Jaramillo
Conference Director
Phone: +1 925-244-0500 ext. 130

Email

l.jaramillo@irei.com

Link: <https://irei.com/events/2025-visions-insights-perspectives-vip-americas/>

Seminar : Private Equity: Investing and Creating Value

Start Date: February 02, 2025

Organizer: The Wharton School, University of Pennsylvania

End Date: February 07, 2025

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Sep 14 - 19 2025, Philadelphia, Pennsylvania

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Private Equity: Investing and Creating Value, you will:

- Learn the various stages of investment, from deal origination through harvesting returns
- Study tools that private equity firms use to structure and finance a deal, create value, and determine exit timing
- Understand the key drivers in the private equity market, and key differences between funds' strategies
- Analyze a deal from the different points of view of a private equity firm and a bank
- Work in teams to review actual deal scenarios, both middle market and megafund, and debate recommendations with faculty and peers for new perspective
- Gain experience in navigating the complex arena of global private equity and emerging markets

See the website for more information about the program.

Fees

\$14,350
Fees include accommodations and meals.

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: <http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/private-equity-investing-and-creating-value>

Seminar : Certificate Series - Investment Basics

Start Date: February 26, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: February 27, 2025

Location: San Diego, California

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Investments

Attendance: Open To All

Take a single course in a specific area or take three courses to earn a Certificate of Achievement in the discipline of your choice. Find solutions for today's challenges and prepare for tomorrow's opportunities through an enriching learning experience that combines valuable materials, outstanding instruction and networking opportunities.

Topics include:

- Investment terms
- Risk and return
- Stocks, bonds and mutual funds
- Investment benchmarks
- Portfolio management and asset allocation
- Contemporary investment issues
- Economic considerations
- Tax considerations
- Sources of information

Please visit the website for more details.

Fees

\$1,920 - non-member
\$1,620 - members

Early bird discount of \$300 if registered by Jan. 13, 2025.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education---events/certificate-programs/certificate-series/investment-basics>

Seminar : Certificate Series - Retirement Plan Basics

Start Date: February 28, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: March 01, 2025

Location: San Diego, California

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

Take a single course in a specific area or take three courses to earn a Certificate of Achievement in the discipline of your choice. Find solutions for today's challenges and prepare for tomorrow's opportunities through an enriching learning experience that combines valuable materials, outstanding instruction and networking opportunities.

Topics for this course include:

- Overview of Social Security
- Retirement plan philosophy
- Defined contribution plans
- Defined benefit plans
- Hybrid plans
- Legal/regulatory environment
- Distribution options
- Benefit design and financing issues

Please visit the website for more details.

Fees

\$1,920 - non-member
\$1,620 - members

Early bird discount of \$300 if registered by Jan. 13, 2025.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education---events/certificate-programs/certificate-series/retirement-plan-basics>

Conference : Winter Meeting

Start Date: March 01, 2025

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: March 03, 2025

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: General

Attendance: Members Only

The winter meeting of NASRA retirement system directors and staff is held typically the last weekend in February or the first weekend in March, in Washington, DC, for a Sunday afternoon of roundtable discussions and presentations. The following day, all NASRA members are invited to hear analysis, forecasts, and overviews of current federal legislative and regulatory activities.

Please visit the website for details.

Fees

Members Only
Please contact organizer for details.

Contact

Mary Hiatte
Tel: 202-624-1418

Email

mary@nasra.org

Link: <https://www.nasra.org/meetings>

Conference : General Assembly

Start Date: March 02, 2025

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 05, 2025

Location: Napa, California

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: General

Attendance: Members Only

The California Association of Public Retirement Systems (CALAPRS) sponsors educational forums for sharing information and exchanging ideas among trustees and staff of California public retirement systems to enhance their ability to administer public pension plan benefits and manage investments consistent with their fiduciary responsibility. CALAPRS carries out its mission through an annual conference called the General Assembly, round table meetings for discussion of topics of interest, and the annual Principles of Pension Management course.

The General Assembly is an educational conference for retirement system trustees, senior staff, and annual sponsors of CALAPRS.

More information about the conference is available exclusively to CALAPRS member systems and sponsors. Please visit the website and log in.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 415-764-4860
Toll-free: 1-800-RETIRE-0
Fax: 415-764-4915

Email

info@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1842373&group=>

Conference : Annual Conference

Start Date: March 03, 2025

Organizer: National Institute on Retirement Security (NIRS)

End Date: March 04, 2025

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Members Only

The National Institute on Retirement Security is a non-profit research and education organization established to contribute to informed policymaking by fostering a deep understanding of the value of retirement security to employees, employers, and the economy as a whole. Located in Washington, D.C., the organization has a diverse membership of organizations interested in retirement security issues such as employee benefit plans, state or local agencies that manage retirement plans, trade associations, financial services firms, and other retirement service providers.

See the website for more information about the conference.

Fees

No charge for members.

Contact

Nicole Dascenzo
Manager of Membership Services
Phone: 202-457-8190

Email

membership@nirsonline.org

Link: <https://www.nirsonline.org/events/nirs-annual-conference/>

Conference : Responsible Investment Forum

Start Date: March 04, 2025

Organizer: Principles for Responsible Investment (PRI)

End Date: March 05, 2025

Location: New York, New York

Alternative Date(s) & Location(s) N/A

Difficulty: Intermediate

Topic Area: ESG and ethical investing

Attendance: Open To All

This year, the PRI will be co-hosting with Private Equity International, the annual Responsible Investment Forum New York. The Responsible Investment Forum will bring together institutional investors, fund managers, consultants and highly recognized associations to discuss why, when, and how your firm should be implementing an effective ESG strategy.

ESG issues are at the heart of all PEI's editorial coverage, with our reporters consistently following and scrutinizing the ways in which managers in the US are adopting responsible investment practices and what LPs are looking for as they consider investing in private equity.

Please see the website for more information.

Fees

For fund and asset managers, and developers.

Various Ticket Prices start from: \$2,095.00 USD

Contact

P: 212 645 1919

Email

erin.w@peimedia.com

Link: <https://www.peievents.com/en/event/responsible-investment-forum-new-york/>

Conference : Spring Conference

Start Date: March 10, 2025

Organizer: Council of Institutional Investors

End Date: March 12, 2025

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Corporate Governance

Attendance: Members Only

CII Spring Conference & 40th Anniversary Celebration

The Council of Institutional Investors (CII), is a nonprofit, nonpartisan association of U.S. asset owners, primarily pension funds, state and local entities charged with investing public assets and endowments and foundations, with combined assets of \$4 trillion. Its associate members include non-U.S. asset owners with more than \$4 trillion in assets and a range of asset managers with more than \$35 trillion in assets under management. CII is a leading voice for effective corporate governance, strong shareowner rights and vibrant, transparent and fair capital markets.

See website for agenda.

Fees

Members with bundled memberships - \$0
 Members - \$195
 Non-members - \$295
 See the website for details.

Contact

Kylund Arnold
 Phone: 202.822.0800

Email

kylund@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=3/10/2025&eventid=226

Conference : Pension Bridge Annual

Start Date: March 24, 2025

Organizer: Pension Bridge

End Date: March 26, 2025

Location: San Francisco, California

Alternative Date(s) & Location(s) N/A

Difficulty: Intermediate

Topic Area: Investments

Attendance: Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together attendees from North America's largest investors and global asset managers, its conferences offer an intimate environment to strengthen relationships, discuss market trends and challenges, and refresh your knowledge of the investment industry.

Please visit the website for more details.

Fees

Please contact the conference organizer.

Contact

Phone: 561-455-2729
 Fax: 561-258-8258

Email

bsemel@pensionbridge.com

Link: <https://events.withintelligence.com/pensionbridgetheannual>

Conference : PREA Spring Conference

Start Date: March 26, 2025

Organizer: Pension Real Estate Association (PREA)

End Date: March 27, 2025

Location: Dallas, Texas

Alternative Date(s) & Location(s) N/A

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

The Pension Real Estate Association (PREA) is a non-profit trade association for the global institutional real estate investment industry. PREA currently lists over 700 corporate member firms across the United States, Canada, Europe and Asia. Its members include public and corporate pension funds, endowments, foundations, Taft-Hartley funds, insurance companies, investment advisory firms, REITs, developers, real estate operating companies and industry service providers.

PREA holds two major conferences each year: the Spring Conference and the Annual Institutional Investor Real Estate Conference.

See the website for more information about the program.

Fees

Corporate Non Member: \$3,990
Please see the website for all registration options.

Contact

Amy Laffargue
Director, Meetings and Events
Phone: 860-785-3846
Fax: 860-692-6351

Email

amy@prea.org

Link: <https://www.prea.org/events/upcoming-events/>

Conference : Private Markets

Start Date: April 16, 2025

Organizer: Pensions & Investments

End Date: April 17, 2025

Location: Chicago, Illinois

Alternative Date(s) & Location(s) N/A

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

LPs are increasingly looking to the private market to achieve returns, so portfolio construction and asset allocation, taking into account appropriate opportunities and risks, is paramount. The proliferation of new strategies and the entry of new GPs brings extra complexity navigating through this rapidly changing market. The program will feature asset owners and asset managers who will discuss:

- Benchmarking and measuring target returns
- Liquidity and premiums on the lack there of
- Finding the right income-generating investments to provide a stream of capital
- Strategy conversations around private credit, infrastructure, real estate, real assets, etc. and how they all interact
- What performance statistics matter the most when assessing a partner and how to properly size your portfolio
- Dry powder and the balance of inflows with finding the right opportunities
- Secondary markets, direct and co-investing.

See the website for more information about the conference.

Fees

\$0 - \$4,000
Please see the website for all registration options, including early bird discount.

Contact

Elayne Glick
Audience Development Director
Phone: (212) 210-0247

Email

eglick@pionline.com

Link: <https://web.cvent.com/event/2672f251-eaba-4c86-b2a1-85237a639bd6/summary?RefId=2025PMPISite>

Conference : Health Care Management Conference

Start Date: April 28, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: April 29, 2025

Location: Fort Myers, Florida

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Healthcare Management

Attendance: Open To All

Health care is ever changing, and it can be hard to keep up and deal with issues and questions that arise. With so many changes and advancements, managing your fund requires action. The Health Care Management Conference will prepare you to make the tough decisions that will keep your fund moving forward, and it will give you the confidence to implement them. Register for this highly rated conference, and keep your fund moving in the right direction.

Topics include: Preparing for the Next Pandemic; Transparency and your TPA; PBMs, Negotiating Medicare Drug Prices and Pipeline Drugs; Preparing for a DOL Audit; Grandfathering Status—Is it Worth Keeping?; Interoperability and Data Sharing; Point Solutions and Telehealth; Aftermath of the COVID-19 Pandemic and Behavioral Health; The Future of Retiree Health Care and Defined Contributions; Oncology and Specialty Drugs—Advocating for Patient Experience; Where to Start with Cost Containment Strategies? Please visit the website for more details.

Fees

\$2,270 - non-member
\$2,050 - members

Early bird discount of \$300 if registered by Mar. 18, 2025.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/schedule/Pages/health-care-management-conference-2431.aspx>

Conference : Plan Sponsor National Conference

Start Date: April 30, 2025

Organizer: Plan Sponsor

End Date: May 02, 2025

Location: Las Vegas, Nevada

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: General

Attendance: By Invitation Only

This conference brings together a cross section of the industry - plan sponsors, retirement plan advisers and providers that support plans and participants meet, also getting to dialog with legislative, legal and policy thought leaders. The conference will cover current trends and best practices, ideas in retirement plan design, investment options and solutions, and legislative and regulatory updates.

Please see the website for more information.

Fees

Member: \$1,215 USD
Non-Member - \$1,615 USD

Early bird discount of \$300

Contact

Rebecca Fahey
Events Coordinator
Tel: +1-203-595-3292

Email

rebecca.fahey@issmediasolutions.com

Link: <https://www.pasca.org/events/pasca-national-interest-form2/>

Conference : Annual Conference

Start Date: May 04, 2025

Organizer: CFA Institute

End Date: May 07, 2025

Location: Chicago, Illinois

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Investments

Attendance: Open To All

The conference is the investment industry's largest and longest-running educational gathering of investment professionals, attracting as many as 2,000 delegates from 70 countries and territories in recent years. It will feature presentations from noted investors, geopolitical experts, best-selling authors, leading researchers, and successful practitioners, covering alternative investing, wealth management, global trends, career development, technology and investing, sustainable investing, psychology and decision making, and more.

Please see the website for more information about the conference as it becomes available.

Fees

Not yet available.

Contact

Phone: (434) 951-5499

Toll-free: 1 (800) 247-8132

Fax: +1 (434) 951-5262

Email

program@cfainstitute.org

Link: <https://www.cfainstitute.org/en/events/conferences>

Conference : Spring Conference

Start Date: May 13, 2025

Organizer: State Association of County Retirement Systems (SACRS)

End Date: May 16, 2025

Location: Los Angeles, California

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: General

Attendance: Open To All

The State Association of County Retirement Systems (SACRS) is an association of 20 California county retirement systems, enacted under the County Employees Retirement Law of 1937. Its semi-annual conferences provide relevant, actionable intelligence on fiduciary responsibility, investment management strategies and recent legislation impacting its member systems' pension programs. These conferences and other SACRS' events provide a platform for trustees, staff and our affiliate members to exchange ideas and best practices on pension administration.

See the website for more information about the conference.

Fees

Not yet available.

Previous year's fees: \$120 system & other non-profit member

\$2,670 - non-member

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

Link: <https://sacrs.org/Events/Spring-Conference>

Conference : Redefining Fixed Income Forum

Start Date: May 13, 2025

Organizer: Institutional Investor

End Date: May 13, 2025

Location: Chicago, Illinois

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

The Redefining Fixed Income (RFI) Forum offers a distinctive opportunity for the fixed-income community to convene and engage through a one-day annual meeting. This gathering provides a regular cadence for peers to come together, fostering a unique environment for both learning and networking. The program will draw on a rich diversity of thought leadership — from investment industry experts, renowned academics, asset management veterans, and some of the most accomplished CIOs of leading pension systems, general accounts, and long-term portfolios. The forum places a strong emphasis on meaningful LP and GP collaboration, our exceptional networking platform offers a rare combination of avenues for participants to engage. This facilitates the exchange of ideas, opportunities, and industry best practices, creating a valuable community collaboration space.

Please visit the website for more details.

Fees

Not available. Registration limited to "qualified individuals". Please contact the conference organizer to register.

Contact

Katarina Storfer
Phone: (212) 224-3073
Fax: (212) 224-3802

Email

kstorfer@institutionalinvestor.com

Link: <https://event.institutionalinvestor.com/event/99928956-4a62-4db8-a370-02466d689b27/summary>

Conference : Trustee Education Seminar

Start Date: May 17, 2025

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 18, 2025

Location: Denver, Colorado

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Board Governance

Attendance: Members Only

This seminar is held in conjunction with the Annual Conference and Exhibition. It is intended for new and novice trustees who are seeking a better understanding of their role and responsibilities as trustee of their pension fund. It also serves as a refresher for experienced trustees interested in staying up-to-date.

The program is designed with a clear focus on the educational needs of trustees who are relatively new to a pension plan board. The focus is on investing principles, board policies, and fundamental concepts that every trustee should know.

The second day of TEDS features the Asset Allocation Challenge, an interactive computer-based investment training exercise. Members are placed in groups and asked to select assets based on the given economic environment presented to them. This program is ideal for new trustees and can be repeated.

TEDS attendees can earn up to eight (9.5) hours of continuing education credits.

Fees

Fund/Stakeholder: \$700

Please check the website for early bird options.

Contact

Alyssa Carlson
Phone: 202-624-1456
Fax: 202-624-1439

Email

registration@ncpers.org

Link: <https://www.ncpers.org/trustee-educational-seminar>

Conference : Accredited Fiduciary (NAF) Program

Start Date: May 17, 2025

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 18, 2025

Location: Denver, Colorado

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: General

Attendance: Members Only

This is a trustee accreditation program specifically designed and tailored for individuals involved in public pension governance. It divides plan governance, oversight and administration into four modules. Each module delves into the fundamental components and strategies necessary for governing a public pension fund, allowing trustees and plan staff to walk away with the key competencies critical to their fiduciary responsibilities. The modules are offered two at a time (1&2 and 3&4), twice a year, and may be taken in any order. It is recommended that candidates first complete the Trustee Educational Seminar (TEDS).

- Module 1 – Governance and the Board’s Role
- Module 2 – Investment and Finance
- Module 3 – Legal, Risk Management and Communication
- Module 4 – Human Capital

See the website for more information about the program.

Fees
Fund Members/Stakeholders: \$1,100

Please check the website for early bird options.

Contact
Alyssa Carlson
Phone: 202-624-1456
Fax: 202-624-1439

Email
registration@ncpers.org

Link: <https://www.ncpers.org/future-conferences>

Conference : Annual Conference and Exhibition

Start Date: May 18, 2025

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 21, 2025

Location: Denver, Colorado

Alternative Date(s) & Location(s) May 17 - 20 2026, Las Vegas, Nevada
May 16 - 19 2027, New York, New York

Difficulty: General

Topic Area: General

Attendance: Members Only

More than 900 trustees, administrators, state and local officials, investment, financial and union officers, pension staff and regulators attend this conference each year. Attendees benefit from the comprehensive educational programming, dynamic speakers, and networking opportunities with money managers, investment service providers and public fund colleagues from across the nation.

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For more information, please visit the website.

Fees
Fund/Stakeholder: \$1,130
Please see the website for all registration options.
Early bird discount of \$200 for registration by Apr 26, '25

Contact
Alyssa Carlson
Phone: 202-624-1456
Fax: 202-624-1439

Email
registration@ncpers.org

Link: <https://www.ncpers.org/annual-conference>

Conference : Washington Legislative Update

Start Date: May 19, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: May 20, 2025

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Legislation

Attendance: Open To All

Attend the Washington Legislative Update to stay informed about the evolving agenda that is currently under development to understand when and how changes may impact your plans and plan participants. Developed in partnership with an elite group of Washington insiders, this conference features topics of relevance, expert speakers and the most up-to-date information. **BENEFITS OF ATTENDING:** Access a direct pipeline to what's happening on the Hill and in key agencies; Hear from expert speakers about the issues, trends and future direction of the industry; Prepare for the future and learn how your plans may be impacted by the new administration as well as recently enacted and proposed legislation and regulations; Connect with peers facing similar challenges; Take away creative ideas and solutions that work. **WHO SHOULD ATTEND:** The content of this program is designed for trustees, administrators and plan professionals in the following areas: Those whose roles require a keen knowledge of legislative and governmental activity; Employee benefit representatives who are responsible for strategic change; Others serving multiemployer, single employer and public sector benefit plans. See website for more details.

Fees

\$1,980 - non-members
\$1,680 - members
Early bird discount of \$300 if registered by April 8, 2025.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/schedule/Pages/washington-legislative-update-2412.aspx>

Seminar : Investment Strategies and Portfolio Management

Start Date: May 19, 2025

Organizer: The Wharton School, University of Pennsylvania

End Date: May 23, 2025

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Oct 20 - 24 2025, Philadelphia, Pennsylvania

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:

- Receive new tools and techniques for creating profitable investment portfolios
- Critically evaluate investment managers using the latest research
- Gain a deeper understanding of how to account for financial risk, including the impact of unforeseen small-probability events like pandemics
- Learn how to assess the stock market's reactions to events using behavioral finance principles
- Get an expert view of the predicted length and shape of an economic recovery
- Understand the macroeconomic outlook both in the U.S. and globally

See the website for more information about the program.

Fees

\$13,500 USD

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: <http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/investment-strategies-and-portfolio-management>

Conference : Advanced Trustees and Administrators Institute

Start Date: June 23, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: June 25, 2025

Location: Nashville, Tennessee

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: General

Attendance: Open To All

The Advanced Trustees and Administrators Institute is designed to keep experienced trustees informed of the latest industry trends, legal and regulatory changes, and best practices as well as bring new ideas to light. Attendees gain a deeper understanding of how to run their pension and health and welfare funds. Developed by active trustees, administrators and professional advisors, each session is designed to address the issues you face today and prepare you for what lies ahead. In these challenging times, you can count on the International Foundation to deliver timely, relevant and balanced education on the trends, issues and future direction of the industry.

Please visit the website for more details.

Fees

\$2,380 - non-member
\$2,050 - member

Early bird discount of \$300 if registered by May 12, 2025.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/TrusteesAdmin/Pages/advanced-trustees-and-administrators-institute-2409.aspx>

Conference : Annual Conference

Start Date: June 29, 2025

Organizer: Government Finance Officers Association (GFOA)

End Date: July 02, 2025

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: General

Attendance: Open To All

GFOA's Annual Conference. Join this event to hear from leading practitioners, recognized industry experts, researchers, and your peers how to effectively prioritize the current needs of your community and prepare for any future challenges. The conference will include more than seventy concurrent sessions featuring leading practitioners, innovators, and industry experts who will discuss best practices, trends, case studies, and more. Sessions will focus on both technical topics like accounting, budgeting, debt management, procurement, risk assessment, technology, and treasury management and leadership areas including ethics, communications, employee development, project management, and meeting facilitation.

Please check website for updates.

Fees

Government Member \$525
Private Sector Member \$670
Non-Member \$945
Please see the website for all registration options.

Contact

Tel:(312) 977-9700
Fax:(312) 977-4806

Email

Link: <https://gfoa.org/annual-conference/annual-conference-overview>

Seminar : Public Pension Investment Management Program

Start Date: July 13, 2025

Organizer: State Association of County Retirement Systems (SACRS)

End Date: July 16, 2025

Location: Berkeley, California

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Investments

Attendance: Open To All

Presented by the world-renowned faculty of UC Berkeley’s Haas School of Business, Modern Investment Theory & Practice for Retirement Systems is a four-day course offering SACRS’ members in-depth knowledge on today’s successful investment models and strategies. You’ll learn how to practically integrate these methods immediately into your own plan administration, advancing your skills and elevating the collective expertise of SACRS’ membership. Completion of the course earns you a certificate of achievement from UC Berkeley.

This program is widely popular and limited to 30-40 people. System members have registration priority.

See the website for more information about the program.

Fees

Affiliate Pricing:\$2,500
Non-Member Pricing:\$2,500

Please see the website for all registration options.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

Link: <https://sacrs.org/Events/SACRS-UC-Berkeley-Program>

Conference : Private Equity Exclusive

Start Date: July 15, 2025

Organizer: Pension Bridge

End Date: July 17, 2025

Location: Chicago, Illinois

Alternative Date(s) & Location(s) N/A

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together over 400 attendees from North America’s largest investors and global asset managers, this day and a half conference offers an intimate environment to strengthen relationships, knowledge sharing and networking, discuss market trends and challenges, and refresh your knowledge of the investment industry.

Seen as the darling of the investment community, private equity now faces significant headwinds globally. The outbreak of war in the Ukraine, rising inflationary pressure, and the threat of recession have provoked a massive reapproaching of spend. However, PE now has an opportunity to purchase distressed assets and tuck in and merge additional technology assets to make returns. This year we will explore these issues in depth, discussing the challenges the private equity industry has faced over the past 12 months, whilst offering an outlook on the trends that lie ahead.

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 561-455-2729

Email

info@pensionbridge.com

Link: <https://events.withintelligence.com/pensionbridgeexclusive>

Seminar : Certificate Series - Intro to Public Sector Benefits Administration

Start Date: July 16, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: July 17, 2025

Location: Chicago, Illinois

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: General

Attendance: Open To All

Take a single course in a specific area or take three courses to earn a Certificate of Achievement in the discipline of your choice. Find solutions for today's challenges and prepare for tomorrow's opportunities through an enriching learning experience that combines valuable materials, outstanding instruction and networking opportunities.

Topics include:

- Structure of public sector
- Government Financing
- Strategic Planning
- Human Resource Strategies, Administrative Measurement, and Project Management
- Request for Proposal (RFP) Process
- Technology
- Legal Environment
- Emerging Issues
- Best Practices

Please check the website for more information as it becomes available.

Fees

\$1,920 - non-member
\$1,620 - members
Early bird discount of \$300 for registration by June 2, 2025

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education---events/certificate-programs/employee-benefits-courses/introduction-to-public-sector-benefits-administration>

Conference : Annual Conference

Start Date: July 17, 2025

Organizer: International Corporate Governance Network (ICGN)

End Date: July 18, 2025

Location: New York, New York

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

ICGN last held a conference in Canada in 2010, over a decade ago. A lot has changed in the last twelve years and so this event gives us the opportunity for reflection as we take stock of what we have learned and achieved over this period, but also to look to the future with regard to priorities for reform as we convene over 500 influential governance professionals in Toronto. As the governance and investor stewardship landscape continues to evolve, our leading expert speakers will provide attendees with key insights into best practice and highlight future priorities for companies, investors and stakeholders.

Please check the website for more information as it becomes available.

Fees

Not yet available

Contact

Flo Doe
Senior Engagement Manager
Phone: +44 (0) 202 7612 7011

Email

florence.doel@icgn.org

Link: <https://www.icgn.org/icgn-americas-30th-anniversary-conference>

Conference : Annual Conference

Start Date: August 09, 2025

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: August 13, 2025

Location: Seattle, Washington

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: General

Attendance: Members Only

NASRA was founded in 1955 as a non-profit association whose members are the directors of the nation's state, territorial, and largest statewide public retirement systems. Its members oversee retirement systems that hold more than two-thirds of the \$4.5 trillion held in trust for 15 million working and 11 million retired employees of state and local government. Its mission is to serve its members in managing sustainable public employee retirement systems through research, education, and collaboration.

The annual conference features leaders in the fields of retirement plan investment and administration covering a variety of subjects including investment management, world events applicable to the pension industry, the economy, human resources, trends, and more.

Please check the website for more information as it becomes available.

Fees

Please contact conference organizer.

Contact

Mary Hiatte
Phone: 202.624.1418

Email

mary@nasra.org

Link: <http://www.nasra.org/meetings>

Conference : Fall Conference

Start Date: September 08, 2025

Organizer: Council of Institutional Investors

End Date: September 10, 2025

Location: San Francisco, California

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Corporate Governance

Attendance: Members Only

The Council of Institutional Investors (CII), is a nonprofit, nonpartisan association of U.S. asset owners, primarily pension funds, state and local entities charged with investing public assets and endowments and foundations, with combined assets of \$4 trillion. Its associate members include non-U.S. asset owners with more than \$4 trillion in assets and a range of asset managers with more than \$35 trillion in assets under management. CII is a leading voice for effective corporate governance, strong shareowner rights and vibrant, transparent and fair capital markets.

See website for agenda.

Fees

No charge for members.
Please visit website for details.

Contact

Kylund Arnold
Phone: 202.822.0800

Email

kylund@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=9/8/2025&eventid=148

Conference : Discussion Forum

Start Date: October 05, 2025

Organizer: International Centre for Pension Management (ICPM)

End Date: October 05, 2025

Location: San Francisco, California

Alternative Date(s) & Location(s) N/A

Difficulty: Advanced

Topic Area: General

Attendance: By Invitation Only

ICPM organizes two Discussion Forums each year that bring together ICPM's Research Partners with leading authorities from academia and policy-making circles to network and build knowledge about critical issues facing the pension system. Held in different parts of the world, Discussion Forums provide a collegial setting for senior executives in the ICPM network and other distinguished pension and investment practitioners to exchange ideas on key pension management topics. In addition, these events feature presentations by academic researchers on findings from ICPM-sponsored research. Research papers, presentation materials and case studies presented at past Discussion Forums are available as a resource for ICPM's Research Partners on global best practices. Summaries of key insights are also provided.

Please visit the website for details.

Fees

\$6,575 CAD

Contact

Phone: 416.925.4153

Fax: 416.925.7377

Email

icpm@icpmnetwork.com

Link: <https://connect.icpmnetwork.com/events>

Seminar : Investment Decisions and Behavioral Finance

Start Date: October 22, 2025

Organizer: Harvard Kennedy School

End Date: October 24, 2025

Location: Cambridge, Massachusetts

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Investments

Attendance: Open To All

This course presents a revolutionary science for investment decision making— behavioral finance. It will discuss the central principles and latest findings of the psychology of decision making under conditions of risk and uncertainty, with a focus on practical applications for those responsible for managing assets and constructing portfolios.

The course will enable you to:

- Understand the applied science of effective decision making.
- Discover how our brains are not wired to deal with the decisions that modern financial markets require and ways to adjust for these shortcomings.
- Learn how and why financial bubbles develop and strategies for recognizing them.
- Identify the psychological reasons that lead investors to make severe investment errors.

See the website for more information about the program.

Fees

\$5,800

Includes tuition, materials and most meals, but not housing.

Application deadline:
Oct. 8, 2025.

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

Link: <https://www.hks.harvard.edu/educational-programs/executive-education/investment-decisions-and-behavioral-finance>

Conference : Annual Institutional Investor Real Estate Conference

Start Date: October 22, 2025

Organizer: Pension Real Estate Association (PREA)

End Date: October 24, 2025

Location: Boston, Massachusetts

Alternative Date(s) & Location(s) N/A

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

The Pension Real Estate Association (PREA) is a non-profit trade association for the global institutional real estate investment industry. PREA currently lists over 700 corporate member firms across the United States, Canada, Europe and Asia. Its members include public and corporate pension funds, endowments, foundations, Taft-Hartley funds, insurance companies, investment advisory firms, REITs, developers, real estate operating companies and industry service providers.

PREA holds two major conferences each year: the Spring Conference and the Annual Institutional Investor Real Estate Conference.

More information about the conference is not yet available.

Fees

Corporate Non Member: \$3,990
Please see the website for all registration options.

Contact

Amy Laffargue
Director, Meetings and Events
Phone: 860-785-3846
Fax: 860-692-6351

Email

amy@prea.org

Link: <https://www.prea.org/events/upcoming-events/>

Conference : NCPERS Fall Conference

Start Date: October 26, 2025

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 29, 2025

Location: Tampa, Florida

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Finance

Attendance: Members Only

The Fall Conference is where public pension trustees, staff, and the industry partners that service them, can come together virtually to learn, exchange ideas, strategize solutions, and make valuable connections.

This two-day virtual program is structured in three tracks that will equip attendees with valuable insights on Financial, Actuarial, Legislative & Legal matters impacting public pensions.

Fall is a time for gathering knowledge... reaping insights.... and harvesting fresh ideas! The NCPERS Fall Conference offers you a convenient and accessible way to continue to advance your learning while still practicing social and physical distancing.

Please check the website for more information as it becomes available.

Fees

Service Provider: \$1,160
Please see the website for all registration options.
Early bird discount of \$200 if registered by TBD.

Contact

Alyssa Carlson
Phone: 202-624-1456
Fax: 202-624-1439

Email

registration@ncpers.org

Link: <https://www.ncpers.org/fall-conference>

Conference : Fall Conference

Start Date: November 11, 2025

Organizer: State Association of County Retirement Systems (SACRS)

End Date: November 14, 2025

Location: Los Angeles, California

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: General

Attendance: Open To All

The State Association of County Retirement Systems (SACRS) is an association of 20 California county retirement systems, enacted under the County Employees Retirement Law of 1937. Its semi-annual conferences provide relevant, actionable intelligence on fiduciary responsibility, investment management strategies and recent legislation impacting its member systems' pension programs. These conferences and other SACRS' events provide a platform for trustees, staff and our affiliate members to exchange ideas and best practices on pension administration.

See the website for more information about the conference.

Fees

Member: \$1,356
Non-Member - \$3,204

Please see the website for all registration options.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

Link: <https://sacrs.org/Events/Fall-Conference>

Seminar : Audit Committees in a New Era of Governance

Start Date: November 16, 2025

Organizer: Harvard Business School

End Date: November 18, 2025

Location: Boston, Massachusetts

Alternative Date(s) & Location(s) N/A

Difficulty: General

Topic Area: Board Governance

Attendance: Open To All

This program explores the best practices that your audit committee can use to fulfill its mandate and increase its strategic contribution. You will acquire the frameworks to align corporate strategy with financial reporting—and help your company operate more effectively in today's rigorous market and regulatory environment. The program prepares you to manage the creative tension between the compliance and strategic roles of the audit committee. While improving your ability to ensure compliance, transparency, and accountability, you will learn how to move your company beyond a compliance mentality toward strategic financial reporting and effective risk management.

See the website for more information about the program.

Fees

\$8,000
Covers tuition, books, accommodation & most meals

Contact

Phone: +1-617-495-6555
Toll-free: 1-800-427-5577

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/audit-committees-new-era-governance>

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