



The Cortex Report

Customized for the

San José Retirement Boards

September 2023

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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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Event Listings

Seminar : Private Equity: Investing and Creating Value**Start Date:** September 10, 2023**Organizer:** The Wharton School, University of Pennsylvania**End Date:** September 15, 2023**Location:** Philadelphia, Pennsylvania**Alternative Date(s) & Location(s)** Mar 10 - 15 2024, 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

\$13,950

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>**Conference : Fall Conference****Start Date:** September 11, 2023**Organizer:** Council of Institutional Investors**End Date:** September 13, 2023**Location:** Long Beach, California**Alternative Date(s) & Location(s)** Sep 9 - 11 2024, Brooklyn, New York**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.

FeesNo 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=9/11/2023&eventid=119

Seminar : Certificate Series - Retirement Plan Basics**Start Date:** September 18, 2023**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** September 19, 2023**Location:** Las Vegas, Nevada**Alternative Date(s) & Location(s)** Mar 4 - 5 2024, Scottsdale, Arizona**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

Fees

\$1,850 - non-member
\$1,630 - members

Early bird discount of \$300 if registered by Aug. 7, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/certificateseries/Pages/retirement-plan-basics.aspx>

Conference : Responsible Investment Forum**Start Date:** September 19, 2023**Organizer:** Private Equity International**End Date:** September 20, 2023**Location:** San Francisco, California**Alternative Date(s) & Location(s)** N/A**Difficulty:** Intermediate**Topic Area:** ESG and ethical investing**Attendance:** Members Only

The Responsible Investment Forum brings together the most sophisticated institutional investors, fund managers, consultants and highly recognized associations to discuss effective ESG strategies that balances the world's sustainability with enhanced returns on investments.

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. PEI continues to prove itself as a thought-leader in this area, and is at the forefront of covering the growth of ESG in North American private equity.

Please see the website for more information.

Fees

For fund and asset managers, and developers.

Various Ticket Prices start from:
\$3,100 USD

Contact

P: 212 645 1919

Email

erin.w@peimedia.com

Link: <https://www.peievents.com/en/event/pei-responsible-investment-forum-san-francisco/>

Seminar: Certificate Series - Investment Basics

Start Date: September 20, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: September 21, 2023

Location: Las Vegas, Nevada

Alternative Date(s) & Location(s) Mar 8 - 9 2024, Scottsdale, Arizona

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

\$1,850 - non-member
\$1,630 - members

Early bird discount of \$300 if registered by Aug. 7, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/certificate-series/Pages/investment-basics.aspx>

Seminar: Pension Governance Education Program

Start Date: September 25, 2023

Organizer: International Centre for Pension Management (ICPM)

End Date: September 28, 2023

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) Oct 1 - 4 2024, Toronto, Ontario, Canada

Difficulty: General

Topic Area: Board Governance

Attendance: Open To All

The Pension Governance Education Program (PGEP) is a unique international governance program designed for board members of large pension funds and long-horizon investment institutions around the globe.

Organized by ICPM and Rotman Executive Programs at the University of Toronto, the program instills best practices in key areas such as organizational mission, fiduciary duties, investment styles, risk management and human resources management, including compensation.

See the website for more information about the program.

Fees

Early Bird Fee: \$8450 + HST before July 1st, 2022

Price increases to \$8,950 + HST on July 1st, 2022.

Contact

Phone: 416.925.4153
Fax: 416.925.7377

Email

icpm@icpmnetwork.com

Link: <https://connect.icpmnetwork.com/events/63f8da55f00c5f0007053b13/description>

Conference : Delivering Alpha**Start Date:** September 28, 2023**Organizer:** Institutional Investor**End Date:** September 28, 2023**Location:** New York, New York**Alternative Date(s)
& Location(s)** N/A**Difficulty:** Intermediate**Topic Area:** Investments**Attendance:** By Invitation Only

This conference brings together the biggest names in the investment community from top institutional and sovereign funds, private equity, hedge funds and venture capital, as well as influential political and economic leaders. CNBC anchors and reporters will lead high-level discussions on the critical issues facing investors in today's global economy through virtual one-on-one interviews and panel sessions.

See the website for more information about the conference.

Fees

\$5,000 USD
Early bird discount of \$1,000

Contact**Email**

events@cnbc.com

Link: <https://www.cnbcevents.com/delivering-alpha-2023/>

Conference : Trustees Masters Program**Start Date:** September 30, 2023**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** October 01, 2023**Location:** Boston, Massachusetts**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Open To All

The Trustees Masters Program (TMP) is for advanced-level trustees who want to gain a deeper insight into their role as well as interact with peers.

The program is divided into two tiers to help further facilitate your ongoing education and recognition. Tiers one and two are required for course completion and to receive your TMP pin.

For more information, please visit the website.

Fees

\$2,170 - non-member
\$1,950 - members

Early bird discount of \$300 if
registered by Aug. 21, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/tmp/Pages/trustees-masters-program-tmp-23d2.aspx>

Conference : Certificate of Achievement in Public Plan Policy - Pension Part I**Start Date:** September 30, 2023**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** October 01, 2023**Location:** Boston, Massachusetts**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** Pension Plan Benefit Policy**Attendance:** Open To All

An essential program for new public sector trustees working with employee pensions, this program addresses the fundamental areas involved in managing employee pension plans. Sessions dissect the basics of what you need to know for your role, and the distinguished faculty bring real-life scenarios and years of experience to enrich the content and your takeaways.

To earn your CAPPP in Pensions, Part I and Part II must be completed along with a take-home exam.

Topics include: governance, fiduciary responsibilities, legal, legislative, and regulatory developments, and actuarial principles.

Please visit the website for more details.

Fees

\$1,770 - non-member
\$1,550 - member

Early bird discount of \$300 if registered by Aug 21, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/cappp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-cappp-pension-part-i-2311.aspx>

Conference : Annual Employee Benefits Conference**Start Date:** October 01, 2023**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** October 04, 2023**Location:** Boston, Massachusetts**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Members Only

The 69th Annual Employee Benefits Conference is the largest gathering of multiemployer and public employee benefit plan representatives. This event offers you the opportunity to network with your peers, be surrounded by industry experts and learn the latest in the industry so you can make the most informed decisions on behalf of your funds.

With topics ranging from legal and legislative to health and welfare to retirement security, the Annual Employee Benefits Conference is the educational event to attend for most current information and perspectives from leading industry experts on all areas of employee benefits. With so many options to choose from, the Annual Conference is like attending several conferences all rolled into one!

Please visit the website for more details.

Fees

MEMBERS ONLY EVENT
Member: \$2,050 USD

Early bird discount of \$300 if registered by Aug. 21, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/usannual/Pages/annual-employee-benefits-conference-2301.aspx>

Conference : Roundtable for Consultants & Institutional Investors**Start Date:** October 04, 2023**Organizer:** Institutional Investor**End Date:** October 05, 2023**Location:** Chicago, Illinois**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** Investments**Attendance:** By Invitation Only

The Roundtable for Consultants & Institutional Investors will look ahead to the worlds that could be and examine the implicit – or explicit – bets that institutional investors have made on those variations.

Please note, attendance is limited to investment executives from qualified investment consultants, pension funds, endowments and foundations. Please contact the conference organizer to register.

See the website for more information about the conference.

Fees

Not available.

Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iinow.com/consultants-roundtable-2023>

Conference : Alternatives Conference**Start Date:** October 10, 2023**Organizer:** Pension Bridge**End Date:** October 11, 2023**Location:** New York, New York**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**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 check the website for more information.

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

bsemel@pensionbridge.com

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

Conference : Fall Conference

Start Date: October 16, 2023

Organizer: Journal of Investment Management

End Date: October 17, 2023

Location: San Francisco, California

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

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

This conference will cover topics from how the biggest pension fund in the world is dealing with this issue to comments from a lead author of the recent authoritative UN Report to quantitative analytics which are useful in managing climate change and other ESG portfolios. Included are practical strategies to cope with climate change mandates.

This event is co-hosted with the UCSD Rady School of Management.

Please see the website for more information about the conference.

Fees

Not available. Please contact conference organizer.

Contact

Phone: (925) 299-7800

Fax: (925) 299-7815

Email

customerservice@joim.com

Link: <https://joim.com/conference-series/>

Seminar : Investment Strategies and Portfolio Management

Start Date: October 16, 2023

Organizer: The Wharton School, University of Pennsylvania

End Date: October 20, 2023

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Apr 15 - 19 2024, 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

\$13,250 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 : Annual Institutional Investor Real Estate Conference

Start Date: October 18, 2023

Organizer: Pension Real Estate Association (PREA)

End Date: October 20, 2023

Location: Boston, Massachusetts

Alternative Date(s) Oct 23 - 25 2024, Washington, District of Columbia

& Location(s) Oct 22 - 24 2025, Boston, Massachusetts

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 : Program for Advanced Trustee Studies (PATs)

Start Date: October 20, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 21, 2023

Location: Washington, District of Columbia

Alternative Date(s) N/A

& Location(s)

Difficulty: Intermediate

Topic Area: Board Governance

Attendance: Members Only

This program is designed for advanced trustees who seek a more intensive, in-depth learning experience. Held annually in conjunction with the Annual Conference & Exhibition, each year's program will focus on two topics of particular importance to pension plan trustees, enabling participants to dig deeper and fully explore issues with their counterparts from around the nation. Topics may include ethics, legal developments, and alternative investments, among other timely themes.

The program, developed more than a decade ago in consultation with Harvard Law School, is formatted to foster dialogue and interaction among attendees.

PATs attendees can earn up to eight (8) hours of continuing education credits.

Fees

MEMBERS ONLY EVENT
Early-Bird Before Sept.20:
Fund/Stakeholder: \$855
After September 20:
Fund/Stakeholder: \$1055

Contact

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

Email

registration@ncpers.org

Link: <https://www.ncpers.org/pats>

Conference : Accredited Fiduciary (NAF) Program

Start Date: October 21, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 22, 2023

Location: Las Vegas, Nevada

Alternative Date(s) & Location(s) May 18 - 19 2024, Seattle, Washington

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

Not yet available

Previous years has been: Fund Members/Stakeholders: \$1050

Early bird discount of \$200

Contact

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

Email

registration@ncpers.org

Link: <https://www.ncpers.org/naf>

Conference : NCPERS FALL Conference

Start Date: October 22, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 25, 2023

Location: Las Vegas, Nevada

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

Fund/Stakeholder: \$300
Service Provider: \$350
Exhibitors: \$550

Contact

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

Email

registration@ncpers.org

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

Seminar : Investment Decisions and Behavioral Finance**Start Date:** October 25, 2023**Organizer:** Harvard Kennedy School**End Date:** October 27, 2023**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

\$5,400
Includes tuition, materials and most meals, but not housing.
Application deadline:
August 30, 2023.

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 : Trustees' Roundtable**Start Date:** October 27, 2023**Organizer:** California Association of Public Retirement Systems (CALAPRS)**End Date:** October 27, 2023**Location:** On-line**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.

Agenda not yet available. More information about the conference will be 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

register@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1706472&group=>

Conference : University of Virginia Investing Conference**Start Date:** November 03, 2023**Organizer:** Darden School of Business**End Date:** November 03, 2023**Location:** Charlottesville, Virginia**Alternative Date(s)
& Location(s)** N/A**Difficulty:** Intermediate**Topic Area:** Investments**Attendance:** Open To All

The Richard A. Mayo Center for Asset Management at the UVA Darden School of Business invites you to join them for the 16th annual University of Virginia Investing Conference (UVIC). This year, UVIC will explore investing in a world of slowing economic growth, geopolitical stress, and a rapid rise in artificial intelligence applications. We will focus attention on how these issues may converge to shape the future of the global economy and markets. Program speakers will also detail approaches and ideas for how investors might position themselves for success over the coming years.

Please see the website for more information about the conference.

Fees

General Admission: \$125

Please see the website for all registration options.

Contact

Stephanie Swing
Operations and Administrative
Coordinator
Phone: +1-434-924-6814

Email

SwingS@arden.virginia.edu

Link: <https://www.darden.virginia.edu/mayo-center/events/uvic>**Conference :** Fall Conference**Start Date:** November 07, 2023**Organizer:** State Association of County Retirement Systems (SACRS)**End Date:** November 10, 2023**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.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Seminar : CII & NYU Corporate Governance Bootcamp**Start Date:** November 07, 2023**Organizer:** Council of Institutional Investors**End Date:** November 08, 2023**Location:** New York, New York**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** Corporate Governance**Attendance:** Open To All

This course a premium executive education program developed in partnership with New York University School of Law's Institute for Corporate Governance and Finance.

Bootcamp is designed as a two-day program, with the first day of instruction covering foundations of corporate governance and the second day covering advanced topics in stewardship. Instructors include faculty from NYU as well as seasoned practitioners

Please see the website for more information and all registration options.

Fees

Non-Members - \$3,500
Members - \$2,500

Please see the website for all registration options.

Contact

Kylund Arnold
(202) 822-0800

Email

kylund@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=11/7/2023&eventid=178

Conference : Fixed Income & Credit**Start Date:** November 14, 2023**Organizer:** Pensions & Investments**End Date:** November 14, 2023**Location:** Chicago, Illinois**Alternative Date(s)
& Location(s)** Nov 16 2023, New York, New York**Difficulty:** General**Topic Area:** Investments**Attendance:** Open To All

Investors need assets that provide returns in a low-yield environment. Recent years have seen a major shift into private credit, strong interest in unconstrained fixed income, and growing interest in emerging markets and quant strategies. This conference will provide a survey of fixed income assets and strategies, and how they fit into a risk profile.

This event will survey the fixed income market from triple A to Z with thought leaders tackling the major questions that face investors as they look to get more out of their fixed income allocations.

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

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

Email

eglick@pionline.com

Link: <https://web.cvent.com/event/3bdcc763-38bf-4431-b328-f7eea8ef6660/summary?RefId=2023FICPISite>

Conference : RI Digital: USA

Start Date: November 15, 2023

Organizer: Responsible Investor

End Date: November 16, 2023

Location: New York, New York

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

This conference will provide a forum for investors to debate shareholder rights and proxy access, the role of central banks and securities regulators in climate risk, the importance of transforming energy systems, the impact of technologies like AI and machine learning on investor portfolios, requirements for data privacy, and ways to include human rights and other governance factors into investment portfolios. It provides a unique opportunity to learn, share and debate on responsible investment issues with 600+ investment professionals from across the globe. You will engage with North America's largest investors on key themes affecting local markets and the rest of the world. Thought-leaders from across the institutional investment sector as well as academic researchers and scientists will come together to debate key issues.

Please visit website for agenda.

Fees

No charge for asset owner and investment consultants.

Contact

Hamish Stewart
Events Leader, Americas
Phone: +44 20 7680 7162

Email

hamish@responsible-investor.com

Link: <https://www.peievents.com/en/event/responsible-investor-usa/>

Seminar : Audit Committees in a New Era of Governance

Start Date: November 15, 2023

Organizer: Harvard Business School

End Date: November 17, 2023

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

\$7,500
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-virtual/>

Conference : Defined Benefit Investment Forum

Start Date: December 06, 2023

Organizer: Canadian Investment Review

End Date: December 06, 2023

Location: Toronto, Ontario, Canada

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

Difficulty: General

Topic Area: Pension Plan Policy

Attendance: By Invitation Only

The conference is an exclusive, educational forum that brings together senior representatives of Canadian pension plan sponsors, as well as representatives from the academic, custodial and money management communities.

Participation is by invitation only. For more information on the DB Investment Forum, please email alison.webb@tc.tc, publisher of Canadian Investment Review for consideration.

Canadian Investment Review is Canada's leading forum for academics, institutional investors and industry practitioners to exchange ideas on the capital markets, investment and economic theory and the related sociology and demographics. To that end, it publishes articles that offer original ideas based on existing literature and brings new insight to relevant themes and practices within the institutional investment community.

Please visit the website for details.

Fees

No charge for qualified DB decision-makers and investment consultants.
Please contact the conference organizer to register.

Contact

Alison Webb, Publisher
Phone: 416-847-8578

Email

alison.webb@tc.tc

Link: <https://www.benefitscanada.com/microsite/defined-benefit-investment-forum-2023/>

Seminar : Leadership Decision Making: Optimizing Organizational

Start Date: January 08, 2024

Organizer: Harvard Kennedy School

End Date: January 19, 2024

Location: On-line

Alternative Date(s) & Location(s) Jun 23 - 28 2024, Cambridge, Massachusetts

Difficulty: Intermediate

Topic Area: Leadership

Attendance: Open To All

Wise judgment and effective decision-making have always been essential skills for leaders across all professional settings. Today, leaders have access to mountains of data from myriad sources. The question is, how can they leverage this abundance of information to make smarter decisions?

Leadership Decision Making (Online) features hands-on learning experiences that help leaders like you improve decision analysis and leadership effectiveness. During this ten-day intensive online program, you'll discover how to recognize biases in judgment that affect even the most intelligent individuals and to incorporate structured decision-making techniques empirically shown to enhance decision making. You'll also receive customized, confidential feedback on your decision-making style.

See the website for more information about the program.

Fees

\$6,400

Application deadline:
December 18, 2023.

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

Link: <https://www.hks.harvard.edu/educational-programs/executive-education/leadership-decision-making>

Conference : Legislative Conference**Start Date:** January 22, 2024**Organizer:** National Conference on Public Employee Retirement Systems**End Date:** January 24, 2024**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

Not yet available

Contact

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

Email

registration@ncpers.org

Link: <https://www.ncpers.org/legislative-conference>**Conference :** 2024 Visions, Insights & Perspectives (VIP) Americas**Start Date:** January 22, 2024**Organizer:** Institutional Real Estate, Inc. (IREI)**End Date:** January 24, 2024**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/2024-visions-insights-perspectives-vip-americas/>

Conference : Annual Health Benefits Conference & Expo

Start Date: January 29, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: January 31, 2024

Location: Clearwater, 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

Early Bird Rate: \$625
Corporate Rate: \$725

Please visit the website for more options.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/schedule/Pages/health-benefits-conference-and-expo-hbce.aspx>

Conference : General Assembly

Start Date: March 02, 2024

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 05, 2024

Location: Palm Springs, 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=1449786&group=>

Seminar : Certificate Series - Intro to Public Sector Benefits Administration		Start Date: March 04, 2024
Organizer: International Foundation of Employee Benefit Plans (IFEBP)		End Date: March 05, 2024
Location: On-line	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 \$1,895 - non-member \$1,675 - members Early bird discount of \$300 for registration by January 22, 2024 Contact Tel: (888) 334-3327 Email edreg@ifebp.org
Link: https://www.ifebp.org/education/certificateprograms/certificate/series/Pages/introduction-to-public-sector-benefits-administration.aspx		

Conference : Spring Conference		Start Date: March 04, 2024
Organizer: Council of Institutional Investors		End Date: March 06, 2024
Location: TBD,	Alternative Date(s) & Location(s) Mar 10 - 12 2025, Brooklyn, New York	
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 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=3/4/2024&eventid=146		

Conference : PREA Spring Conference

Start Date: March 21, 2024

Organizer: Pension Real Estate Association (PREA)

End Date: March 22, 2024

Location: Nashville, Tennessee

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 : Public Funds Roundtable

Start Date: April 29, 2024

Organizer: Institutional Investor

End Date: May 01, 2024

Location: Los Angeles, California

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

Join the Alternative Investor Institute & Institutional Investor institute's Roundtable for Public Pension Funds as we bring the institutional investing community together when they need it most – for the most essential intelligence for consultants, allocators, and managers alike.

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

Fees

Not avail. Registration limited to investment executives from pension funds. Please contact conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iinow.com/public-funds-roundtable>

Conference : Spring Conference

Start Date: May 07, 2024

Organizer: State Association of County Retirement Systems (SACRS)

End Date: May 10, 2024

Location: San Diego, 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.
Last year's fees: \$120 - system
and other non-profit member
\$2,670 - non-member
Registration opens Jan 2022.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : Plan Sponsor National Conference

Start Date: May 15, 2024

Organizer: Plan Sponsor

End Date: May 17, 2024

Location: Salt Lake City, Utah

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 if
registered by March 28, 2023

Contact

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

Email

rebecca.fahey@issmediasolutions.com

Link: <https://www.pscanational.org/>

Conference : Trustee Education Seminar**Start Date:** May 18, 2024**Organizer:** National Conference on Public Employee Retirement Systems**End Date:** May 19, 2024**Location:** Seattle, Washington**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

Not yet available.

Contact

Alyssa Carlson

Phone: 202-624-1456

Fax: 202-624-1439

Email

registration@ncpers.org

Link: <https://www.ncpers.org/trustee-educational-seminar>**Conference : Annual Conference and Exhibition****Start Date:** May 19, 2024**Organizer:** National Conference on Public Employee Retirement Systems**End Date:** May 22, 2024**Location:** Seattle, Washington**Alternative Date(s)
& Location(s)** May 18 - 21 2025, Denver, Colorado
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.

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.

For more information, please visit the website.

Fees

Not yet available.

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

Start Date: June 09, 2024

Organizer: Government Finance Officers Association (GFOA)

End Date: June 12, 2024

Location: Orlando, Florida

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

Not available. Please contact conference organizer.

Contact

Tel:(312) 977-9700

Fax:(312) 977-4806

Email

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

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