



# ***The Cortex Report***

**Customized for the**

**San José Retirement Boards**

**March 2024**

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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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| May 06, 2024 | International Foundation of Employee Benefit Plans (IFEBP)         | Portfolio Concepts and Management                                  | Philadelphia, Pennsylvania | 6    | New |
| May 06, 2024 | International Foundation of Employee Benefit Plans (IFEBP)         | Washington Legislative Update                                      | Washington, District of    | 7    |     |
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| Jul 17, 2024 | Harvard Business School                                            | Audit Committees in a New Era of Governance                        | Boston, Massachusetts      | 11   |     |
| Jul 22, 2024 | Pension Bridge                                                     | Private Equity Exclusive                                           | Chicago, Illinois          | 12   | New |
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| Aug 18, 2024 | National Conference on Public Employee Retirement Systems (NCPERS) | Public Pension Funding Forum                                               | Palm Springs, California   | 14   |     |
| Aug 26, 2024 | California Association of Public Retirement Systems (CALAPRS)      | General Principles of Pension Governance for Trustees                      | San Francisco, California  | 14   | New |
| Sep 08, 2024 | The Wharton School, University of Pennsylvania                     | Private Equity: Investing and Creating Value                               | Philadelphia, Pennsylvania | 2    |     |
| Sep 09, 2024 | Council of Institutional Investors                                 | Fall Conference                                                            | Brooklyn, New York         | 15   |     |
| Sep 16, 2024 | International Foundation of Employee Benefit Plans (IFEBP)         | Certificate Series - Investment Basics                                     | Nashville, Tennessee       | 15   |     |
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| Oct 01, 2024 | International Centre for Pension Management (ICPM)                 | Pension Governance Education Program                                       | Toronto, Ontario, Canada   | 16   |     |
| Oct 06, 2024 | International Centre for Pension Management (ICPM)                 | Discussion Forum                                                           | Toronto, Ontario, Canada   | 17   |     |
| Oct 08, 2024 | Principles for Responsible Investment (PRI)                        | PRI in Person                                                              | Toronto, Ontario, Canada   | 17   |     |
| Oct 14, 2024 | The Wharton School, University of Pennsylvania                     | Investment Strategies and Portfolio Management                             | Philadelphia, Pennsylvania | 5    |     |
| Oct 16, 2024 | Pension Bridge                                                     | Alternatives Conference                                                    | New York, New York         | 18   | New |
| Oct 23, 2024 | Pension Real Estate Association (PREA)                             | Annual Institutional Investor Real Estate Conference                       | Washington, District of    | 18   |     |
| Oct 26, 2024 | National Conference on Public Employee Retirement Systems (NCPERS) | Program for Advanced Trustee Studies (PATs)                                | Washington, District of    | 19   |     |
| Oct 26, 2024 | National Conference on Public Employee Retirement Systems (NCPERS) | Accredited Fiduciary (NAF) Program                                         | Palm Springs, California   | 9    |     |
| Oct 27, 2024 | National Conference on Public Employee Retirement Systems (NCPERS) | Public Safety Conference                                                   | Palm Springs, California   | 19   |     |
| Nov 10, 2024 | International Foundation of Employee Benefit Plans (IFEBP)         | Annual Employee Benefits Conference                                        | San Diego, California      | 20   |     |
| Nov 12, 2024 | State Association of County Retirement Systems (SACRS)             | Fall Conference                                                            | Los Angeles, California    | 20   | New |
| Nov 13, 2024 | Institutional Investor                                             | Delivering Alpha                                                           | New York, New York         | 21   | New |
| Nov 20, 2024 | Harvard Business School                                            | Audit Committees in a New Era of Governance                                | Boston, Massachusetts      | 11   |     |
| Dec 03, 2024 | Responsible Investor                                               | RI Digital: USA                                                            | New York, New York         | 21   | New |
| Jan 06, 2025 | Harvard Kennedy School                                             | Leadership Decision Making: Optimizing Organizational Performance (Online) | On-line                    | 22   | New |

## ***Event Listings***

**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=>

**Conference :** Health Care Management Conference**Start Date:** March 04, 2024**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** March 05, 2024**Location:** San Diego, California**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**

\$2,325 - non-member  
\$1,995 - members

Early bird discount of \$300 if registered by Jan. 22, 2024.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

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



**Conference : Spring Conference****Start Date:** March 04, 2024**Organizer:** Council of Institutional Investors**End Date:** March 06, 2024**Location:** Washington, District of Columbia**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](https://www.cii.org/ev_calendar_day.asp?date=3/4/2024&eventid=146)

**Seminar : Private Equity: Investing and Creating Value****Start Date:** March 10, 2024**Organizer:** The Wharton School, University of Pennsylvania**End Date:** March 15, 2024**Location:** Philadelphia, Pennsylvania**Alternative Date(s) & Location(s)** Sep 8 - 13 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 : 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)** Mar 26 - 27 2025, Dallas, Texas

**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/>

**Seminar : Advanced Principles of Pension Governance for Trustees**

**Start Date:** March 27, 2024

**Organizer:** California Association of Public Retirement Systems (CALAPRS)

**End Date:** March 29, 2024

**Location:** Los Angeles, California

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

**Difficulty:** General

**Topic Area:** Board Governance

**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 Governance courses.

More information about the course 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**

register@calaprs.org

**Link:** <https://www.calaprs.org/events/EventDetails.aspx?id=1685857&group=>

**Conference : Private Markets**

**Start Date:** April 09, 2024

**Organizer:** Pensions & Investments

**End Date:** April 10, 2024

**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 thereof
- 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/569d9632-1434-4c35-a8fd-86e259c7cfba/regPage:4855376f-5cbc-495b-aae5-b821af5b1231?Refid=2024PMPISite>

**Conference : Pension Bridge Annual**

**Start Date:** April 15, 2024

**Organizer:** Pension Bridge

**End Date:** April 17, 2024

**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>

**Seminar : Investment Strategies and Portfolio Management****Start Date:** April 15, 2024**Organizer:** The Wharton School, University of Pennsylvania**End Date:** April 19, 2024**Location:** Philadelphia, Pennsylvania**Alternative Date(s) & Location(s)** Oct 14 - 18 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

**Contact**

Phone: 215.898.1776  
Toll-free: 1.800.255.3932

**Email**[execed@wharton.upenn.edu](mailto:execed@wharton.upenn.edu)

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

**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](mailto:kstorfer@institutionalinvestor.com)

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

**Conference : Trustees' Roundtable**

**Start Date:** May 03, 2024

**Organizer:** California Association of Public Retirement Systems (CALAPRS)

**End Date:** May 03, 2024

**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=1814407&group=>

**Conference : Portfolio Concepts and Management**

**Start Date:** May 06, 2024

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** May 09, 2024

**Location:** Philadelphia, Pennsylvania

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

**Difficulty:** General

**Topic Area:** Investments

**Attendance:** Open To All

This course provides the core principles of portfolio theory and investment performance measurement, offering practical tools and experiences to help you make reliable investment management decisions. This program offers lecture/discussion sessions, problem solving exercises and small-group case study sessions in a 3½-day format. Grow confidence in your ability to evaluate investments with a broad, fundamental understanding of investment products and practices. This program is intended for those who have little experience with investment-related course work. Fiduciaries from both defined benefit and defined contribution plans who represent various industries, sizes and geographic areas (United States and Canada), including: Multiemployer and public plan trustees; Administrators and fund staff; Human resources and benefits professionals; Corporate officers and executives; Finance personnel; Investment professionals.

Please visit the website for more details.

**Fees**

\$6,780 - non-member  
\$6,450 - member  
Early bird discount of \$300 if registered by Mar. 25, 2024.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/education/certificateprograms/wharton/Pages/portfolio-concepts-and-management-2404.aspx>

**Conference :** Washington Legislative Update

**Start Date:** May 06, 2024

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** May 07, 2024

**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**

\$1,945 - non-members  
\$1,725 - members  
Early bird discount of \$300 if registered by March 25, 2024.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

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

**Conference :** Spring Conference

**Start Date:** May 07, 2024

**Organizer:** State Association of County Retirement Systems (SACRS)

**End Date:** May 10, 2024

**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 : 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

**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**

Fund/Stakeholder: \$700

Early bird discount of \$200 for registration before April 26, 2024.

**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 18, 2024

**Organizer:** National Conference on Public Employee Retirement Systems

**End Date:** May 19, 2024

**Location:** Seattle, Washington

**Alternative Date(s) & Location(s)** Oct 26 - 27 2024, Palm Springs, California

**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

Early bird discount of \$200 if registered before September 20, 2023.

**Contact**

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

**Email**

registration@ncpers.org

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

**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

**Difficulty:** General

May 16 - 19 2027, New York, New York

**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**

Fund/Stakeholder: \$1,130  
Please see the website for all registration options.  
Early bird discount of \$200 for registration by Apr 26, '24

**Contact**

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

**Email**

registration@ncpers.org

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



**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>

**Conference : Advanced Trustees and Administrators Institute**

**Start Date:** June 24, 2024

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** June 26, 2024

**Location:** San Diego, California

**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**

\$2,325 - non-member  
\$1,995 - member

Early bird discount of \$300 if registered by May 13, 2024.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

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

|                                                                          |                                                                                     |
|--------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <b>Seminar :</b> Public Pension Investment Management Program            | <b>Start Date:</b> July 14, 2024                                                    |
| <b>Organizer:</b> State Association of County Retirement Systems (SACRS) | <b>End Date:</b> July 17, 2024                                                      |
| <b>Location:</b> Berkeley, California                                    | <b>Alternative Date(s) &amp; Location(s)</b> Jul 13 - 15 2025, Berkeley, California |
| <b>Difficulty:</b> 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. Agenda for the 2020 program is under development.

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>

|                                                              |                                                                                      |
|--------------------------------------------------------------|--------------------------------------------------------------------------------------|
| <b>Seminar :</b> Audit Committees in a New Era of Governance | <b>Start Date:</b> July 17, 2024                                                     |
| <b>Organizer:</b> Harvard Business School                    | <b>End Date:</b> July 19, 2024                                                       |
| <b>Location:</b> Boston, Massachusetts                       | <b>Alternative Date(s) &amp; Location(s)</b> Nov 20 - 22 2024, Boston, Massachusetts |
| <b>Difficulty:</b> 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 : Private Equity Exclusive**

**Start Date:** July 22, 2024

**Organizer:** Pension Bridge

**End Date:** July 24, 2024

**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>

**Conference : Certificate of Achievement in Public Plan Policy - Pension Part I**

**Start Date:** July 30, 2024

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** July 31, 2024

**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  
\$1,595 - member

Early bird discount of \$300 if registered by Jun 18, 2024.

**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-23a1.aspx>

**Conference :** Certificate of Achievement in Public Plan Policy - Pension Part II

**Start Date:** August 01, 2024

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** August 02, 2024

**Location:** Boston, Massachusetts

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

**Difficulty:** General

**Topic Area:** Pension Plan Benefit Policy

**Attendance:** Open To All

Expanding upon the fundamental knowledge gained in Part I, the Certificate in Employee Pensions - Part II addresses the elements of plan design, investments, improvement strategies and emerging issues so you can be fully equipped to make the necessary decisions for your plans.

The structure of the CAPPP® program is flexible. Part II of the Certificate in Employee Pensions can be taken prior to Part I to accommodate your schedule. To earn your certificate both Part I and Part II must be completed along with a take-home exam.

Topics include: plan design, investments, business improvement strategies, and emerging issues.

Please visit the website for more details.

**Fees**

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

Early bird discount of \$300 if registered by Jun 12, 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-ii-23a2.aspx>

**Conference :** Annual Conference

**Start Date:** August 03, 2024

**Organizer:** National Association of State Retirement Administrators (NASRA)

**End Date:** August 07, 2024

**Location:** Pittsburgh, Pennsylvania

**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 : Public Pension Funding Forum**

**Start Date:** August 18, 2024

**Organizer:** National Conference on Public Employee Retirement Systems

**End Date:** August 20, 2024

**Location:** Palm Springs, California

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

**Difficulty:** General

**Topic Area:** Pension Plan Policy

**Attendance:** Open To All

The issue of pension funding gap, real or not, is often used to change pension plans as we know them. The most common solutions revolve around increasing employee and employer contributions, reducing benefits, and converting lifetime guarantee of defined benefit pensions into do it yourself pension schemes.

This forum will examine the obstacles that stand in the way of closing public pension funding gap and explore new solutions to overcome such obstacles, including better risk management in economic cycles, use of new and improved debt instruments, and closing tax loopholes.

Please see the website for more information about the conference.

**Fees**

Not yet available.

Previous years has been:  
Fund/Stakholder: \$250  
Service Provider: \$300

**Contact**

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

**Email**

registration@ncpers.org

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

**Seminar : General Principles of Pension Governance for Trustees**

**Start Date:** August 26, 2024

**Organizer:** California Association of Public Retirement Systems (CALAPRS)

**End Date:** August 29, 2024

**Location:** San Francisco, California

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

**Difficulty:** General

**Topic Area:** Board Governance

**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 Governance courses.

More information about the course 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**

register@calaprs.org

**Link:** <https://www.calaprs.org/events/EventDetails.aspx?id=1816797&group=>

**Conference : Fall Conference**

**Start Date:** September 09, 2024

**Organizer:** Council of Institutional Investors

**End Date:** September 11, 2024

**Location:** Brooklyn, New York

**Alternative Date(s) & Location(s)** Sep 8 - 10 2025, San Francisco, California

**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=9/9/2024&eventid=134](https://www.cii.org/ev_calendar_day.asp?date=9/9/2024&eventid=134)

**Seminar : Certificate Series - Investment Basics**

**Start Date:** September 16, 2024

**Organizer:** International Foundation of Employee Benefit Plans (IFEBCP)

**End Date:** September 17, 2024

**Location:** Nashville, Tennessee

**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**

\$1,895 - non-member  
\$1,675 - members

Early bird discount of \$300 if registered by Aug. 5, 2024.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

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

**Seminar : Certificate Series - Retirement Plan Basics**

**Start Date:** September 18, 2024

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** September 19, 2024

**Location:** Nashville, Tennessee

**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

**Fees**

\$1,895 - non-member  
\$1,675 - members

Early bird discount of \$300 if registered by Aug. 5, 2024.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

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

**Seminar : Pension Governance Education Program**

**Start Date:** October 01, 2024

**Organizer:** International Centre for Pension Management (ICPM)

**End Date:** October 04, 2024

**Location:** Toronto, Ontario, Canada

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

**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**

\$9,380 CAD

Please see the website for all registration options.

**Contact**

Phone: 416.925.4153  
Fax: 416.925.7377

**Email**

icpm@icpmnetwork.com

**Link:** <https://connect.icpmnetwork.com/events/649adfde3730cf00085c94a7/description>



**Conference : Discussion Forum**

**Start Date:** October 06, 2024

**Organizer:** International Centre for Pension Management (ICPM)

**End Date:** October 06, 2024

**Location:** Toronto, Ontario, Canada

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

**Difficulty:** Advanced

**Topic Area:** General

**Attendance:** By Invitation Only

Sunday, October 6, 2024 5:00 p.m. (Eastern Time Zone)

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>

**Conference : PRI in Person**

**Start Date:** October 08, 2024

**Organizer:** Principles for Responsible Investment (PRI)

**End Date:** October 10, 2024

**Location:** Toronto, Ontario, Canada

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

**Difficulty:** Intermediate

**Topic Area:** ESG and ethical investing

**Attendance:** Open To All

The PRI is the world's leading proponent of responsible investment. It works to understand the investment implications of environmental, social and governance (ESG) factors and to support its international network of investor signatories in incorporating these factors into their investment and ownership decisions.

PRI in Person brings together PRI signatories and other investment professionals to learn, network and collaborate in person over several days. Attracting a diverse audience, it offers something to attendees at all stages of the responsible investment journey, giving them an opportunity to discuss topical issues and share experiences from their own organisation and reason with peers from around the world.

See the website for more information about the conference.

**Fees**

\$2,750 USD

Please see the website for all registration options.

**Contact**

Joanne Wackrill

Director of Events

Phone: +44 (0)20 3714 3177

**Email**

jo.wackrill@unpri.org

**Link:** <https://www.unpri.org/news-and-events/upcoming-events/pri-in-person-2024>



**Conference :** Alternatives Conference

**Start Date:** October 16, 2024

**Organizer:** Pension Bridge

**End Date:** October 17, 2024

**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 :** Annual Institutional Investor Real Estate Conference

**Start Date:** October 23, 2024

**Organizer:** Pension Real Estate Association (PREA)

**End Date:** October 25, 2024

**Location:** Washington, District of Columbia

**Alternative Date(s) & 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 26, 2024**Organizer:** National Conference on Public Employee Retirement Systems**End Date:** October 27, 2024**Location:** Washington, District of Columbia**Alternative Date(s)  
& Location(s)** N/A**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/future-conferences>**Conference : Public Safety Conference****Start Date:** October 27, 2024**Organizer:** National Conference on Public Employee Retirement Systems**End Date:** October 30, 2024**Location:** Palm Springs, California**Alternative Date(s)  
& Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Members Only

This conference is dedicated to providing quality education that is specifically tailored for the unique needs and demands of public safety pensions. Since 1985, it has educated hundreds of public safety pension trustees, administrators and staff; union officials; and local elected officials by featuring presentations from recognized leaders in both the worlds of finance and politics, providing news on the latest developments, and offering attendees the opportunity to network with fellow trustees.

Please see the website for more information.

**Fees**

Service Provider: \$1,190  
  
Please see the website for all  
registration options.

**Contact**

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

**Email**

registration@ncpers.org

**Link:** <https://www.ncpers.org/public-safety-conference>

**Conference :** Annual Employee Benefits Conference**Start Date:** November 10, 2024**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** November 13, 2024**Location:** San Diego, California**Alternative Date(s)  
& Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Members Only

The 70th 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: \$2,095 USD

Early bird discount of \$300 if  
registered by Sept. 30, 2024.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/education/usannual/Pages/annual-employee-benefits-conference-2401.aspx>

**Conference :** Fall Conference**Start Date:** November 12, 2024**Organizer:** State Association of County Retirement Systems (SACRS)**End Date:** November 15, 2024**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>

**Conference :** Delivering Alpha

**Start Date:** November 13, 2024

**Organizer:** Institutional Investor

**End Date:** November 13, 2024

**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-2024/>

**Conference :** RI Digital: USA

**Start Date:** December 03, 2024

**Organizer:** Responsible Investor

**End Date:** December 04, 2024

**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**

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Events Leader, Americas  
Phone: +44 20 7680 7162

**Email**

hamish@responsible-investor.com

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

**Seminar :** Leadership Decision Making: Optimizing Organizational

**Start Date:** January 06, 2025

**Organizer:** Harvard Kennedy School

**End Date:** January 17, 2025

**Location:** On-line

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

**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 16, 2024

**Contact**

Phone: +1-617-496-9000

**Email**

exed@hks.harvard.edu

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

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