



The Cortex Report

Customized for the

San José Retirement Boards

May 2025

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Introduction to The Cortex Report

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

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

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

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Event Listings

Conference : Annual Symposium**Start Date:** May 01, 2025**Organizer:** Pension Research Council, The Wharton School**End Date:** May 02, 2025**Location:** Philadelphia, Pennsylvania**Alternative Date(s)
& Location(s)** N/A**Difficulty:** Advanced**Topic Area:** Pension Plan Policy**Attendance:** Members Only

The Pension Research Council Symposium on Diversity, Inclusion, and Inequality: Implications for Retirement Income Security and Policy explores the determinants and dynamics of inequality in retirement income outcomes with an emphasis on inequality by race and ethnicity. Researchers will examine the role of housing wealth, pensions, and Social Security in reducing inequality. In addition, experts will evaluate inequality-mitigating effects of old-age public and private retirement saving programs policies. Although there has been a great deal of public emphasis on top 1% and 0.1% of wealth inequality, the conference aims to consider inequality for more representative people, excluding the highest wealth shares.

Please visit the website and log in for more information.

Fees

By invitation only.

Please contact conference organizer.

Contact

Phone: 215.898.7620

Fax: 215.573.3418

Email

prc@wharton.upenn.edu

Link: <https://pensionresearchcouncil.wharton.upenn.edu/conferences/>

Conference : Annual Conference**Start Date:** May 04, 2025**Organizer:** CFA Institute**End Date:** May 07, 2025**Location:** Chicago, Illinois**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** Investments**Attendance:** Open To All

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

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

Fees

\$1,495

Please see the website for all registration options including early bird rates.

Contact

Phone: (434) 951-5499

Toll-free: 1 (800) 247-8132

Fax: +1 (434) 951-5262

Email

program@cfainstitute.org

Link: <https://www.cfainstitute.org/insights/events/2025/may-2025-cfa-institute-live>

Conference : Portfolio Concepts and Management**Start Date:** May 12, 2025**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** May 15, 2025**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

\$6,980 - non-member
\$6,650 - member

Early bird discount of \$300 if registered by Mar. 25, 2025.

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 : Spring Conference**Start Date:** May 13, 2025**Organizer:** State Association of County Retirement Systems (SACRS)**End Date:** May 16, 2025**Location:** Los Angeles, California**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Open To All

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

See the website for more information about the conference.

Fees

Not yet available.
Previous year's fees: \$120 system & other non-profit member
\$2,670 - non-member

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : Redefining Fixed Income Forum

Start Date: May 13, 2025

Organizer: Institutional Investor

End Date: May 13, 2025

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

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

Please visit the website for more details.

Fees

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

Contact

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

Email

kstorfer@institutionalinvestor.com

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

Conference : Trustee Education Seminar

Start Date: May 17, 2025

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 18, 2025

Location: Denver, Colorado

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

Difficulty: General

Topic Area: Board Governance

Attendance: Members Only

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

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

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

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

Fees

Fund/Stakeholder: \$700

Please check the website for early bird options.

Contact

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

Email

registration@ncpers.org

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

Conference : Accredited Fiduciary (NAF) Program**Start Date:** May 17, 2025**Organizer:** National Conference on Public Employee Retirement Systems**End Date:** May 18, 2025**Location:** Denver, Colorado**Alternative Date(s) & Location(s)** Oct 25 - 26 2025, Ft. Lauderdale, Florida**Difficulty:** General**Topic Area:** General**Attendance:** Members Only

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

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

See the website for more information about the program.

Fees

Fund Members/Stakeholders:
\$1,100

Please check the website for early bird options.

Contact

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

Email

registration@ncpers.org

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

Conference : Annual Conference and Exhibition**Start Date:** May 18, 2025**Organizer:** National Conference on Public Employee Retirement Systems**End Date:** May 21, 2025**Location:** Denver, Colorado**Alternative Date(s) & Location(s)** May 17 - 20 2026, Las Vegas, Nevada
May 16 - 19 2027, New York, New York**Difficulty:** General**Topic Area:** General**Attendance:** Members Only

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

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, '25

Contact

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

Email

registration@ncpers.org

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

Conference : Washington Legislative Update

Start Date: May 19, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: May 20, 2025

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: Legislation

Attendance: Open To All

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

Fees

\$1,980 - non-members
\$1,780 - members

Early bird discount of \$300 if registered by April 7, 2025.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Seminar : Investment Strategies and Portfolio Management

Start Date: May 19, 2025

Organizer: The Wharton School, University of Pennsylvania

End Date: May 23, 2025

Location: Philadelphia, Pennsylvania

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:

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

See the website for more information about the program.

Fees

\$13,500 USD

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference : Trustees' Roundtable**Start Date:** May 30, 2025**Organizer:** California Association of Public Retirement Systems (CALAPRS)**End Date:** May 30, 2025**Location:** On-line**Alternative Date(s)
& Location(s)** Oct 3 2025, On-line**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=1916508&group=>

Conference : Advanced Trustees and Administrators Institute**Start Date:** June 23, 2025**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** June 25, 2025**Location:** Nashville, Tennessee**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Open To All

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

Please visit the website for more details.

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Annual Conference

Start Date: June 29, 2025

Organizer: Government Finance Officers Association (GFOA)

End Date: July 02, 2025

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

Please check website for updates.

Fees

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

Contact

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

Email

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

Seminar : Public Pension Investment Management Program

Start Date: July 13, 2025

Organizer: State Association of County Retirement Systems (SACRS)

End Date: July 16, 2025

Location: Berkeley, California

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

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

Please see the website for all registration options.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : Private Equity Exclusive

Start Date: July 15, 2025

Organizer: Pension Bridge

End Date: July 17, 2025

Location: Chicago, Illinois

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

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together over 400 attendees from North America's largest investors and global asset managers, this day and a half conference offers an intimate environment to strengthen relationships, knowledge sharing and networking, discuss market trends and challenges, and refresh your knowledge of the investment industry. Seen as the darling of the investment community, private equity now faces significant headwinds globally. The outbreak of war in the Ukraine, rising inflationary pressure, and the threat of recession have provoked a massive reapproaching of spend. However, PE now has an opportunity to purchase distressed assets and tuck in and merge additional technology assets to make returns. This year we will explore these issues in depth, discussing the challenges the private equity industry has faced over the past 12 months, whilst offering an outlook on the trends that lie ahead.

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 561-455-2729

Email

info@pensionbridge.com

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

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

Start Date: July 15, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBC)

End Date: July 16, 2025

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

\$1,920 - non-member
\$1,700 - member

Early bird discount of \$300 if registered by Jun 2, 2025.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: [https://www.ifebp.org/education---events/educational-program-schedule/certificate-of-achievement-in-public-plan-policy-\(cappp\)--pension-part-i/institute-for-apprenticeship--training-and-education-programs](https://www.ifebp.org/education---events/educational-program-schedule/certificate-of-achievement-in-public-plan-policy-(cappp)--pension-part-i/institute-for-apprenticeship--training-and-education-programs)

Seminar : Certificate Series - Intro to Public Sector Benefits Administration
Organizer: International Foundation of Employee Benefit Plans (IFEBP)
Location: Chicago, Illinois
Difficulty: General

Start Date: July 16, 2025

End Date: July 17, 2025

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

Topic Area: General

Attendance: Open To All

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

Topics include:

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

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

Fees

\$1,920 - non-member
 \$1,700 - members
 Early bird discount of \$300 for registration by June 2, 2025

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Annual Conference

Start Date: July 17, 2025

Organizer: International Corporate Governance Network (ICGN)

End Date: July 18, 2025

Location: New York, New York

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

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

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

Fees

Not yet available

Contact

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

Email

florence.doel@icgn.org

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

Seminar : Certificate Series - Retirement Plan Basics

Start Date: July 18, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: July 19, 2025

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

Topics for this course include:

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

Please visit the website for more details.

Fees

\$1,920 - non-member
\$1,700 - members

Early bird discount of \$300 if registered by Jun. 1, 2025.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Annual Conference

Start Date: August 09, 2025

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: August 13, 2025

Location: Seattle, Washington

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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

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

Fees

Please contact conference organizer.

Contact

Mary Hiatte
Phone: 202.624.1418

Email

mary@nasra.org

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

Conference : Public Pension Funding Forum

Start Date: August 17, 2025

Organizer: National Conference on Public Employee Retirement Systems

End Date: August 19, 2025

Location: Chicago, Illinois

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/funding-forum>

Conference : Fall Conference

Start Date: September 08, 2025

Organizer: Council of Institutional Investors

End Date: September 10, 2025

Location: San Francisco, California

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Members Only

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

See website for agenda.

Fees

No charge for members.
Please visit website for details.

Contact

Kylund Arnold
Phone: 202.822.0800

Email

kylund@cii.org

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

Conference : Fixed Income & Credit

Start Date: September 09, 2025

Organizer: Pensions & Investments

End Date: September 10, 2025

Location: Dallas, Texas

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

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/905b82a4-73e7-420a-8283-e7e4ad04afdb/summary?RefId=2025FICPISite>

Seminar : Private Equity: Investing and Creating Value

Start Date: September 14, 2025

Organizer: The Wharton School, University of Pennsylvania

End Date: September 19, 2025

Location: Philadelphia, Pennsylvania

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

\$14,500
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 : Discussion Forum

Start Date: October 05, 2025

Organizer: International Centre for Pension Management (ICPM)

End Date: October 05, 2025

Location: Vancouver, British Columbia, Canada

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

Difficulty: Advanced

Topic Area: General

Attendance: By Invitation Only

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

Please visit the website for details.

Fees

\$6,575 CAD

Contact

Phone: 416.925.4153

Fax: 416.925.7377

Email

icpm@icpmnetwork.com

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

Seminar : Pension Governance Education Program

Start Date: October 07, 2025

Organizer: International Centre for Pension Management (ICPM)

End Date: October 07, 2025

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/6765a98ae797740007f15b7e/description>

Seminar : Investment Decisions and Behavioral Finance

Start Date: October 22, 2025

Organizer: Harvard Kennedy School

End Date: October 24, 2025

Location: Cambridge, Massachusetts

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

The course will enable you to:

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

See the website for more information about the program.

Fees

\$5,800
Includes tuition, materials and most meals, but not housing.
Application deadline:
Oct. 8, 2025.

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

Conference : Annual Institutional Investor Real Estate Conference

Start Date: October 22, 2025

Organizer: Pension Real Estate Association (PREA)

End Date: October 24, 2025

Location: Boston, Massachusetts

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

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

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

More information about the conference is not yet available.

Fees

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

Contact

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

Email

amy@prea.org

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

Conference : Program for Advanced Trustee Studies (PATs)**Start Date:** October 25, 2025**Organizer:** National Conference on Public Employee Retirement Systems**End Date:** October 26, 2025**Location:** Ft. Lauderdale, Florida**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/pats>**Conference : NCPERS Fall Conference****Start Date:** October 26, 2025**Organizer:** National Conference on Public Employee Retirement Systems**End Date:** October 29, 2025**Location:** Ft. Lauderdale, Florida**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** Finance**Attendance:** Members Only

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

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

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

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

Fees

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

Contact

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

Email

registration@ncpers.org

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

Conference : Alternatives Conference

Start Date: October 28, 2025

Organizer: Pension Bridge

End Date: October 28, 2025

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 : Trustees Masters Program

Start Date: November 08, 2025

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: November 09, 2025

Location: Honolulu, Hawaii

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

\$2,270 - non-member

\$2,050 - members

Early bird discount of \$300 if registered by Sept. 29, 2025.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education---events/educational-program-schedule/trustees-masters-program/event-home>

Conference : Annual Employee Benefits Conference**Start Date:** November 09, 2025**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** November 12, 2025**Location:** Honolulu, Hawaii**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Members Only

The 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

Please check the website for early bird options.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education---events/educational-program-schedule/annual-employee-benefits-conference/event-overview>

Conference : Fall Conference**Start Date:** November 11, 2025**Organizer:** State Association of County Retirement Systems (SACRS)**End Date:** November 14, 2025**Location:** Los Angeles, California**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Open To All

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

See the website for more information about the conference.

Fees

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

Please see the website for all registration options.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Seminar : CII & NYU Corporate Governance Bootcamp

Start Date: November 20, 2025

Organizer: Council of Institutional Investors

End Date: November 21, 2025

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 - \$2,800

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=11/20/2025&eventid=230

Conference : RI Digital: USA

Start Date: December 02, 2025

Organizer: Responsible Investor

End Date: December 03, 2025

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 : Leadership Decision Making: Optimizing Organizational

Start Date: January 05, 2026

Organizer: Harvard Kennedy School

End Date: January 16, 2026

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

\$6,600

Application deadline:
Dec. 15, 2025

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>

Conference : Responsible Investment Forum

Start Date: March 03, 2026

Organizer: Principles for Responsible Investment (PRI)

End Date: March 04, 2026

Location: New York, New York

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

Difficulty: Intermediate

Topic Area: ESG and ethical investing

Attendance: Open To All

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

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

Please see the website for more information.

Fees

For fund and asset managers, and developers.

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

Contact

P: 212 645 1919

Email

erin.w@peimedia.com

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

Conference : General Assembly**Start Date:** March 08, 2026**Organizer:** California Association of Public Retirement Systems (CALAPRS)**End Date:** March 11, 2026**Location:** Carlsbad, 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=1944759&group=>

Conference : PREA Spring Conference**Start Date:** March 26, 2026**Organizer:** Pension Real Estate Association (PREA)**End Date:** March 27, 2026**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/>

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