



The Cortex Report

Customized for the

San José Retirement Boards

March 2023

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Introduction to The Cortex Report

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

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

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

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Jan 22, 2024	Institutional Real Estate, Inc. (IREI)	2024 Visions, Insights & Perspectives (VIP) Americas	Carlsbad, California	24	

Event Listings

Conference : Responsible Investment Forum

Start Date: March 01, 2023

Organizer: Private Equity International

End Date: March 02, 2023

Location: New York, New York

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

Difficulty: Intermediate

Topic Area: ESG and ethical investing

Attendance: Members Only

This year, Private Equity International will be co-hosting with Principles for Responsible Investment, the 7th annual Responsible Investment Forum New York on March 1-2, 2023. 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.

Key content pieces this year will include the push towards net-zero commitments and a heavier focus on climate action, an exploration of the ESG regulatory landscape, practical steps for analyzing data sets for value creation, streamlining of universal ESG frameworks and metrics, key learnings from our European counterparts, and the budding growth of impact as its own asset class. Hear from the leading investors, managers, and expert advisors on the latest ESG strategies.

Please see the website for more information.

Fees

For fund and asset managers, and developers.

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

Contact

P: 212 645 1919

Email

erin.w@peimedia.com

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

Seminar : Certificate Series - Retirement Plan Basics

Start Date: March 03, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBC)

End Date: March 04, 2023

Location: Orlando, Florida

Alternative Date(s) & Location(s) Jul 28 - 29 2023, Chicago, Illinois
Sep 18 - 19 2023, Las Vegas, Nevada

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

Topics for this course include:

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

Fees

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

Early bird discount of \$300 if registered by Jan. 16, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : General Assembly**Start Date:** March 04, 2023**Organizer:** California Association of Public Retirement Systems (CALAPRS)**End Date:** March 07, 2023**Location:** Monterey, California**Alternative Date(s) & Location(s)** Mar 2 - 5 2024, Rancho Mirage, California**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=1449781&group=>

Conference : Spring Conference**Start Date:** March 06, 2023**Organizer:** Council of Institutional Investors**End Date:** March 08, 2023**Location:** Washington, District of Columbia**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

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=3/6/2023&eventid=120

Seminar : Private Equity: Investing and Creating Value

Start Date: March 12, 2023

Organizer: The Wharton School, University of Pennsylvania

End Date: March 17, 2023

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

\$13,650
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 22, 2023

Organizer: Pension Real Estate Association (PREA)

End Date: March 23, 2023

Location: Seattle, Washington

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

Not yet available.

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**
Organizer: California Association of Public Retirement Systems (CALAPRS)
Location: Los Angeles, California
Difficulty: General
Alternative Date(s) & Location(s) N/A

Start Date: March 29, 2023

End Date: March 31, 2023

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 : **ESG Investing**

Start Date: April 11, 2023

Organizer: Pensions & Investments

End Date: April 12, 2023

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

The program will feature asset owners, asset managers, and ESG experts who will discuss:

- Diversity and its impact on performance
- The regulatory environment and fiduciary obligations
- How climate can impact an overall portfolio
- Best vehicles and asset classes to make an impact
- Investment performance of ESG integrated products
- ESG as a risk management tool

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/95e2fda7-653b-452f-bf93-507feb23154/summary?RefId=2023ESGPISite>

Conference : Pension Bridge Annual**Start Date:** April 17, 2023**Organizer:** Pension Bridge**End Date:** April 19, 2023**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 17, 2023**Organizer:** The Wharton School, University of Pennsylvania**End Date:** April 21, 2023**Location:** Philadelphia, Pennsylvania**Alternative Date(s)
& Location(s)** N/A**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

\$12,500

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>

Seminar : Global Asset Allocation		Start Date: April 17, 2023
Organizer: BCA Research		End Date: April 17, 2023
Location: On-line	Alternative Date(s) & Location(s)	Apr 17 2023, London, UK May 9 - 18 2023, On-line Jun 13 - 22 2023, On-line
Difficulty: General		
Topic Area: Investments		Attendance: Open To All
<p>BCA has been an independent provider of global investment research for over 65 years. Markets are, to use Paul Samuelson's phrase, "micro efficient but macro inefficient." CIOs, asset allocators, and investment professionals often struggle to find a practical way to construct optimal multi-asset portfolios. This course will help you:</p> <ul style="list-style-type: none"> • Learn methods and strategies to harvest alpha from these macro inefficiencies. • Identify portfolio objectives as a starting point for successful asset allocation strategies. • Match the macro environment with the appropriate asset allocation strategies - often the most challenging part of the investment process. • Become more effective at interpreting how BCA's Global Asset Allocation team sees the world; an important input given the increasingly complex macro environment. • Gain a better understanding of how to develop and execute asset allocation strategies, and how investors should be positioned given prevailing market conditions. <p>The course comprises two 1-hour sessions per week for 4 weeks (Tuesday and Thursday).</p>		<p>Fees</p> <p>On-line: \$2,000 USD In-person: \$2,500 USD</p> <p>Contact</p> <p>Phone: +1 514 499 9550 Toll-free: 1 800 724 2942</p> <p>Email</p> <p>academy@bcaresearch.com</p>
Link: https://info.bcaresearch.com/bca-eacademy		

Conference : Trustees' Roundtable		Start Date: April 21, 2023
Organizer: California Association of Public Retirement Systems (CALAPRS)		End Date: April 21, 2023
Location: On-line	Alternative Date(s) & Location(s)	Oct 27 2023, On-line
Difficulty: General		
Topic Area: General		Attendance: Members Only
<p>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.</p> <p>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.</p>		<p>Fees</p> <p>Not available. Please contact the conference organizer.</p> <p>Contact</p> <p>Phone: 415-764-4860 Toll-free: 1-800-RETIRE-0 Fax: 415-764-4915</p> <p>Email</p> <p>register@calaprs.org</p>
Link: https://www.calaprs.org/events/EventDetails.aspx?id=1706385&group=		

Conference : Health Care Management Conference

Start Date: April 24, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: April 25, 2023

Location: Miami, Florida

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

Difficulty: General

Topic Area: Healthcare Management

Attendance: Open To All

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

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

Fees

\$2,280 - non-member
\$1,950 - members

Early bird discount of \$300 if registered by Mar. 13, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/schedule/Pages/health-care-management-conference-2331.aspx>

Conference : Public Funds Roundtable

Start Date: April 24, 2023

Organizer: Institutional Investor

End Date: April 26, 2023

Location: Los Angeles, California

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

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

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

Fees

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

Contact

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

Email

kstorfer@institutionalinvestor.com

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

Conference : Portfolio Concepts and Management**Start Date:** May 01, 2023**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** May 04, 2023**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

\$6,635 - non-member
\$6,195 - member
Early bird discount of \$440 if registered by Mar. 20, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/wharton/Pages/portfolio-concepts-and-management-2304.aspx>

Conference : Plan Sponsor National Conference**Start Date:** May 03, 2023**Organizer:** Plan Sponsor**End Date:** May 05, 2023**Location:** Orlando, Florida**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** By Invitation Only

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

Please see the website for more information.

Fees

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

Early bird discount of \$300 if registered by March 28, 2023

Contact

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

Email

rebecca.fahey@issmediasolutions.com

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

Conference : Spring Conference**Start Date:** May 09, 2023**Organizer:** State Association of County Retirement Systems (SACRS)**End Date:** May 12, 2023**Location:** San Diego, California**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Open To All

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

See the website for more information about the conference.

Fees

Not yet available.
Last year's fees: \$120 - system
and other non-profit member
\$2,670 - non-member
Registration opens Jan 2022.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : Private Markets**Start Date:** May 09, 2023**Organizer:** Pensions & Investments**End Date:** May 10, 2023**Location:** Miami, Florida**Alternative Date(s) & Location(s)** N/A**Difficulty:** Advanced**Topic Area:** Investments**Attendance:** Open To All

The program will feature asset owners and asset managers who will discuss:

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

See the website for more information about the conference.

Fees

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/82159d99-7537-4d5a-a1dd-c235a0af177e/summary?RefId=2022PMPISite>

Conference : Trustee Education Seminar

Start Date: May 20, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 21, 2023

Location: New Orleans, Louisiana

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

Difficulty: General

Topic Area: Board Governance

Attendance: Members Only

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

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

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

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

Fees

Not yet available.

Contact

Alyssa Carlson

Phone: 202-624-1456

Fax: 202-624-1439

Email

registration@ncpers.org

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

Conference : Accredited Fiduciary (NAF) Program

Start Date: May 20, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 21, 2023

Location: New Orleans, Louisiana

Alternative Date(s) & Location(s) Oct 21 - 22 2023, Las Vegas, Nevada

Difficulty: General

Topic Area: General

Attendance: Members Only

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

Module 1 – Governance and the Board's Role

Module 2 – Investment and Finance

Module 3 – Legal, Risk Management and Communication

Module 4 – Human Capital

See the website for more information about the program.

Fees

Not yet available

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

Early bird discount of \$200

Contact

Alyssa Carlson

Phone: 202-624-1456

Fax: 202-624-1439

Email

registration@ncpers.org

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

Conference : Annual Conference

Start Date: May 21, 2023

Organizer: Government Finance Officers Association (GFOA)

End Date: May 24, 2023

Location: Portland, Oregon

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 : Annual Conference and Exhibition

Start Date: May 21, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 24, 2023

Location: New Orleans, Louisiana

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

Attendees benefit from the comprehensive educational programming, dynamic speakers, and networking opportunities with money managers, investment service providers and public fund colleagues from across the nation.

For more information, please visit the website.

Fees

Not yet available.

Contact

Alyssa Carlson

Phone: 202-624-1456

Fax: 202-624-1439

Email

registration@ncpers.org

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

Conference : Washington Legislative Update

Start Date: May 22, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: May 23, 2023

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

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

Early bird discount of \$300 if registered by Apr. 10, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/schedule/Pages/washington-legislative-update-2312.aspx>

Conference : Redefining Fixed Income Forum

Start Date: May 23, 2023

Organizer: Institutional Investor

End Date: May 24, 2023

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

Fixed income is resilient to say the least, after historical lows it is time to work smarter and not harder on building your fixed income portfolios in 2023. Amid geopolitical concerns of war, pandemic to endemic, volatility in the markets, and inflation concerns, investors are finally looking at a recalibration, but upward transition may be slower than expected. Staying on top of market and macro factors is important, more than ever. While investor interest remains high in private credit, there is no denying that bonds remain a part of diversified portfolios. Despite a tough year, fixed income is one of the portfolio solutions for those long-term investors who can take advantage of the dislocations of the market with widening credit spreads and create a buffer through multisector diversified portfolios. There are always opportunities created amid a volatile environment and it is time to find them!

The conference agenda is not yet available. See website for 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://www.iinow.com/Institutional-Investor-Forums/redefining-fixed-income-forum-2023>

Conference : Leadership Development Conference

Start Date: June 01, 2023

Organizer: The Conference Board

End Date: June 02, 2023

Location: On-line

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

Difficulty: General

Topic Area: Leadership

Attendance: Open To All

Resilient Leadership for Volatile Times

More than 50% of senior leaders say their talent development efforts don't build critical skills and capabilities needed for the future. In fact, the demand for leaders who can anticipate and address complex, evolving business needs has never been greater. Though global investment in leadership development and coaching is steadily increasing—with spending in the billions—the ROI is often meager.

Join your fellow Human Capital, Talent, Coaching and Leadership Development peers during this two-day virtual event where the agenda will address the challenge of how to build better leaders for the business needs of the future. Through case studies, action-oriented research, and a spotlight on emerging technologies and trends, we'll explore how organizations are leveraging leadership development and coaching to transform both leaders and the business.

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

Fees

\$495 - non-members
Free - members

Contact

Phone: +1 212 339 0345
Fax: +1 212 836 9740

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/events/leadership-coaching>

Conference : Discussion Forum

Start Date: June 04, 2023

Organizer: International Centre for Pension Management (ICPM)

End Date: June 04, 2023

Location: Montreal, Quebec, Canada

Alternative Date(s) & Location(s) Oct 1 2023, Copenhagen, Denmark

Difficulty: Advanced

Topic Area: General

Attendance: By Invitation Only

Sunday, June 4, 2023 at 6:00 pm (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>

Seminar : Leadership Decision Making: Optimizing Organizational		Start Date: June 05, 2023
Organizer: Harvard Kennedy School		End Date: June 16, 2023
Location: On-line	Alternative Date(s) & Location(s) N/A	
Difficulty: Intermediate		
Topic Area: Leadership		Attendance: Open To All
<p>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?</p> <p>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.</p> <p>See the website for more information about the program.</p>		<p>Fees</p> <p>\$6,200</p> <p>Application deadline: May15, 2023.</p> <p>Contact</p> <p>Phone: +1-617-496-9000</p> <p>Email</p> <p>exed@hks.harvard.edu</p>
Link: https://www.hks.harvard.edu/educational-programs/executive-education/leadership-decision-making		

Seminar : Public Pension Investment Management Program		Start Date: July 16, 2023
Organizer: State Association of County Retirement Systems (SACRS)		End Date: July 19, 2023
Location: Berkeley, California	Alternative Date(s) & Location(s) N/A	
Difficulty: General		
Topic Area: Investments		Attendance: Open To All
<p>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.</p> <p>This program is widely popular and limited to 30-40 people. System members have registration priority.</p> <p>See the website for more information about the program.</p>		<p>Fees</p> <p>Affiliate Pricing:\$2,500 Non-Member Pricing:\$2,500</p> <p>Please see the website for all registration options.</p> <p>Contact</p> <p>Phone: 916-701-5158</p> <p>Email</p> <p>sacrs@sacrs.org</p>
Link: https://sacrs.org/Events/SACRS-UC-Berkeley-Program		

Seminar: Alternative Investment Strategies

Start Date: July 18, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: July 20, 2023

Location: San Francisco, California

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

Alternative Investment Strategies is a 2½-day specialty program that provides practical education to help you understand the complexities of alternative investments. Focused on the topics of hedge funds and real estate investing for benefit funds, this advanced-level course will provide you with the tools to make effective investment decisions. The course schedule covers lecture/discussion sessions, problem-solving exercises and group breakout sessions. Topics include:

- Introduction and Overview of Hedge Funds and Other Alternative Investments
- Institutional Interest in Hedge Funds and Hedge Fund Styles and Flows
- Hedge Fund Investing
- Lessons From Hedge Fund Failures and Topics in Hedge Fund Allocation
- Other Alternative Investment Trends and the Future
- Equity Investments in Real Estate
- Debt Investments in Real Estate

See the website for more information about the program.

Fees

\$5,125 - non-members
\$4,795 - members
Early bird discount of \$300 for registration by June 6, 2023

Contact

Phone: (262) 786-6710
Toll-free: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/wharton/Pages/alternative-investment-strategies-23h5.aspx>

Seminar: Audit Committees in a New Era of Governance

Start Date: July 19, 2023

Organizer: Harvard Business School

End Date: July 21, 2023

Location: Boston, Massachusetts

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

Difficulty: General

Topic Area: Board Governance

Attendance: Open To All

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

See the website for more information about the program.

Fees

\$7,000
Covers tuition, books, accommodation & most meals

Contact

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

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/audit-committees-virtual/>

Conference : Certificate of Achievement in Public Plan Policy - Pension Part I**Start Date:** July 24, 2023**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** July 25, 2023**Location:** Chicago, Illinois**Alternative Date(s) & Location(s)** Sep 30 - Oct 1 2023, Chicago, Illinois**Difficulty:** General**Topic Area:** Pension Plan Benefit Policy**Attendance:** Open To All

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

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

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

Please visit the website for more details.

Fees

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

Early bird discount of \$300 if registered by 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-i-23a1.aspx>

Conference : Certificate of Achievement in Public Plan Policy - Pension Part II**Start Date:** July 26, 2023**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** July 27, 2023**Location:** Chicago, Illinois**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 05, 2023

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: August 09, 2023

Location: Broomfield, Colorado

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 20, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: August 22, 2023

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>

Seminar : General Principles of Pension Governance for Trustees	Start Date: August 28, 2023
Organizer: California Association of Public Retirement Systems (CALAPRS)	End Date: August 31, 2023
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=1706484&group=>

Conference : Fall Conference

Start Date: September 11, 2023

Organizer: Council of Institutional Investors

End Date: September 13, 2023

Location: Long Beach, California

Alternative Date(s) & Location(s) 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=9/11/2023&eventid=119

Seminar : Certificate Series - Investment Basics

Start Date: September 20, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: September 21, 2023

Location: Las Vegas, Nevada

Alternative Date(s) & Location(s) 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

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Trustees Masters Program

Start Date: September 30, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: October 01, 2023

Location: Boston, Massachusetts

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

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

For more information, please visit the website.

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Annual Employee Benefits Conference

Start Date: October 01, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: October 04, 2023

Location: Boston, Massachusetts

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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

Please visit the website for more details.

Fees

FOR MEMBERS ONLY
Member: \$2,050 USD

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Roundtable for Consultants & Institutional Investors

Start Date: October 03, 2023

Organizer: Institutional Investor

End Date: October 05, 2023

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

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

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

See the website for more information about the conference.

Fees

Not available.

Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

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

Conference : PRI in Person

Start Date: October 03, 2023

Organizer: Principles for Responsible Investment (PRI)

End Date: October 05, 2023

Location: On-line

Alternative Date(s) & Location(s) Oct 3 - 5 2023, Tokyo, Japan

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

Not available.
Please contact conference organizer.

Contact

Joanne Wackrill
Director of Events
Phone: +44 (0)20 3714 3177

Email

jo.wackrill@unpri.org

Link: <https://www.unpri.org/all-events-and-webinars/pri-in-person-2023/10826.article>

Conference : Annual Institutional Investor Real Estate Conference

Start Date: October 18, 2023

Organizer: Pension Real Estate Association (PREA)

End Date: October 20, 2023

Location: Boston, Massachusetts

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

Not yet available.

Contact

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

Email

amy@prea.org

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

Conference : NCPERS FALL Conference

Start Date: October 22, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 25, 2023

Location: Las Vegas, Nevada

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

Difficulty: General

Topic Area: Finance

Attendance: Members Only

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

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

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

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

Fees

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

Contact

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

Email

registration@ncpers.org

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

Seminar : Investment Decisions and Behavioral Finance

Start Date: October 25, 2023

Organizer: Harvard Kennedy School

End Date: October 27, 2023

Location: Cambridge, Massachusetts

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

The course will enable you to:

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

See the website for more information about the program.

Fees

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

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

Conference : Fall Conference

Start Date: November 07, 2023

Organizer: State Association of County Retirement Systems (SACRS)

End Date: November 10, 2023

Location: Los Angeles, California

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

See the website for more information about the conference.

Fees

Not yet available.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : RI Digital: USA

Start Date: December 06, 2023

Organizer: Responsible Investor

End Date: December 07, 2023

Location: New York, New York

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

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

Please visit website for agenda.

Fees

No charge for asset owner and investment consultants.

Contact

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

Email

hamish@responsible-investor.com

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

Conference : 2024 Visions, Insights & Perspectives (VIP) Americas

Start Date: January 22, 2024

Organizer: Institutional Real Estate, Inc. (IREI)

End Date: January 24, 2024

Location: Carlsbad, California

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: By Invitation Only

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

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

Fees

Not available. Please contact conference organizer.

Contact

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

Email

l.jaramillo@irei.com

Link: <https://irei.com/events/2024-visions-insights-perspectives-vip-americas/>

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