



The Cortex Report

Customized for the

San José Retirement Boards

May 2022

This page is intentionally left blank

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.

This page is intentionally left blank

Table of Contents

Start Date	Primary Organizer	Event	Location	Page
May 03, 2022	The Conference Board	Leadership Development Conference	On-line	1
May 04, 2022	International Corporate Governance Network (ICGN)	ICGN Governance, Stewardship & Sustainability Course	On-line	1
May 09, 2022	Institute for Management Development (IMD) Business School	Digital Transformation for Boards	On-line	2
May 10, 2022	State Association of County Retirement Systems (SACRS)	Spring Conference	San Diego, California	2
May 10, 2022	Institutional Investor	Redefining Fixed Income Forum	Chicago, Illinois	3
May 13, 2022	Institute for Management Development (IMD) Business School	Strategy Governance for Boards	On-line	3
May 16, 2022	Columbia Business School	Corporate Governance: Developing Exceptional Board Leaders	On-line	4
May 21, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Trustee Education Seminar	Washington, District of	4
May 21, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	Washington, District of	5
May 22, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference and Exhibition	Washington, District of	5
May 23, 2022	International Foundation of Employee Benefit Plans (IFEBP)	Washington Legislative Update	On-line	6
May 31, 2022	BCA Research	Global Asset Allocation	On-line	6
Jun 05, 2022	Government Finance Officers Association (GFOA)	Annual Conference	Austin, Texas	7
Jun 06, 2022	International Foundation of Employee Benefit Plans (IFEBP)	Certificate of Achievement in Public Plan Policy - Part I	Santa Monica, California	7
Jun 08, 2022	Plan Sponsor	Plan Sponsor National Conference	On-line	8
Jun 08, 2022	International Foundation of Employee Benefit Plans (IFEBP)	Certificate of Achievement in Public Plan Policy - Part II	Santa Monica, California	8
Jun 13, 2022	Institute for Management Development (IMD) Business School	Board and Risk for Boards	On-line	9
Jun 13, 2022	Harvard Kennedy School	Leadership Decision Making: Optimizing Organizational Performance (Online)	On-line	9
Jun 19, 2022	International Centre for Pension Management (ICPM)	Discussion Forum	Toronto, Ontario, Canada	10 <i>New</i>
Jun 20, 2022	Institutional Investor	Roundtable for Consultants & Institutional Investors	Chicago, Illinois	10 <i>New</i>
Jun 27, 2022	International Foundation of Employee Benefit Plans (IFEBP)	Advanced Trustees and Administrators Institute	Orlando, Florida	11 <i>New</i>
Jul 17, 2022	State Association of County Retirement Systems (SACRS)	Public Pension Investment Management Program	Berkeley, California	11
Jul 20, 2022	Harvard Business School	Audit Committees in a New Era of Governance	Boston, Massachusetts	12 <i>New</i>
Jul 25, 2022	Pension Bridge	Private Equity Exclusive	Chicago, Illinois	12
Aug 06, 2022	National Association of State Retirement Administrators (NASRA)	Annual Conference	Long Beach, California	13

Table of Contents

Start Date	Primary Organizer	Event	Location	Page	
Aug 21, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Public Pension Funding Forum	Los Angeles, California	13	
Aug 23, 2022	International Foundation of Employee Benefit Plans (IFEBCP)	Certificate Series - Intro to Public Sector Benefits Administration	On-line	14	New
Aug 29, 2022	California Association of Public Retirement Systems (CALAPRS)	General Principles of Pension Governance for Trustees	TBD, California	14	
Sep 12, 2022	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia, Pennsylvania	15	
Sep 19, 2022	International Centre for Pension Management (ICPM)	Pension Governance Education Program	Toronto, Ontario, Canada	15	New
Sep 19, 2022	Principles for Responsible Investment (PRI)	PRI Academic Week	On-line	16	New
Sep 19, 2022	Principles for Responsible Investment (PRI)	PRI Academic Network Conference	On-line	16	New
Sep 19, 2022	International Foundation of Employee Benefit Plans (IFEBCP)	Certificate Series - Retirement Plan Basics	Washington, District of	17	
Sep 20, 2022	Principles for Responsible Investment (PRI)	PRI in Person	On-line	17	New
Sep 23, 2022	International Foundation of Employee Benefit Plans (IFEBCP)	Certificate Series - Investment Basics	Washington, District of	18	
Sep 28, 2022	Institutional Investor	Delivering Alpha	New York, New York	18	New
Oct 01, 2022	Pension Bridge	Alternatives Conference	Los Angeles, California	19	New
Oct 07, 2022	Institute for Management Development (IMD) Business School	Digital Transformation for Boards	On-line	2	
Oct 10, 2022	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	On-line	19	New
Oct 19, 2022	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Washington, District of	20	
Oct 19, 2022	Columbia Business School	Corporate Governance: Developing Exceptional Board Leaders	New York, New York	4	
Oct 22, 2022	International Foundation of Employee Benefit Plans (IFEBCP)	Trustees Masters Program	Las Vegas, Nevada	20	
Oct 22, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	Nashville, Kentucky	5	
Oct 23, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Public Safety Conference	Nashville, Tennessee	21	
Oct 23, 2022	International Foundation of Employee Benefit Plans (IFEBCP)	Annual Employee Benefits Conference	Las Vegas, Nevada	21	
Oct 23, 2022	International Foundation of Employee Benefit Plans (IFEBCP)	Annual Employee Benefits Conference	On-line	21	
Oct 26, 2022	Harvard Kennedy School	Investment Decisions and Behavioral Finance	Cambridge, Massachusetts	22	New
Nov 16, 2022	Council of Institutional Investors	CII & NYU Corporate Governance Bootcamp	New York, New York	22	New
Nov 16, 2022	Harvard Business School	Audit Committees in a New Era of Governance	Boston, Massachusetts	12	New
Nov 21, 2022	Institute for Management Development (IMD) Business School	Strategy Governance for Boards	On-line	3	

Table of Contents

Start Date	Primary Organizer	Event	Location	Page	
Nov 23, 2022	Institute for Management Development (IMD) Business School	Board and Risk for Boards	On-line	9	
Jan 22, 2023	National Conference on Public Employee Retirement Systems (NCPERS)	Legislative Conference	Washington, District of	23	<i>New</i>
Mar 04, 2023	California Association of Public Retirement Systems (CALAPRS)	General Assembly	Monterey, California	23	
Mar 22, 2023	Pension Real Estate Association (PREA)	PREA Spring Conference	Seattle, Washington	24	<i>New</i>

Event Listings

Conference : Leadership Development Conference

Start Date: May 03, 2022

Organizer: The Conference Board

End Date: May 04, 2022

Location: On-line

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

Difficulty: General

Topic Area: Leadership

Attendance: Open To All

The workplace and workforce have changed over the last year and a half. Now more than ever, leaders need different approaches in managing hybrid teams, the intersection of workers, technologies, and engagement, and the mental health of employees. Through inspiring stories, innovations, recent research, panel speakers, and more, you'll hear from leading organizations that have a laser focus on developing leadership skills and how they have integrated this into their organization.

The Leadership for the New Hybrid Workforce Conference will focus on approaches to managing the new work environment. By attending this conference, you will: Hear from CEO's who changed the culture in their organization through leadership? Learn first-hand how investing in leadership has a direct impact on business outcomes; Gain insights into how key leaders have struggled and come through on the other side to be even better leaders; Explore leading-edge ways of developing leaders needed for the future

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/leadership-development>

Seminar : ICGN Governance, Stewardship & Sustainability Course

Start Date: May 04, 2022

Organizer: International Corporate Governance Network (ICGN)

End Date: May 25, 2022

Location: On-line

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

The Governance, Stewardship and Sustainability course gives investment professionals, company managers, investor relations officers, corporate directors and other governance professionals what they need to know about the theoretical, empirical and especially practical aspects of integrating ESG into investor and company decision-making. The structure and content of this substantially-updated course reflect the accelerating pace of developments.

The course will be delivered in three approximately 2.5 sessions over the course of the month. The webinar format provides course participants the opportunity for live interaction with the instructors and other participants.

For more information, please visit the website.

Fees

£430 + 20% VAT - member
£645 + 20% VAT - non-member

Contact

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

Email

florence.doel@icgn.org

Link: <https://www.icgn.org/education/icgn-governance-stewardship-sustainability-course-may-2022>

Seminar : Digital Transformation for Boards		Start Date: May 09, 2022
Organizer: Institute for Management Development (IMD) Business School		End Date: May 10, 2022
Location: On-line	Alternative Date(s) & Location(s) Oct 7 - 8 2022, On-line	
Difficulty: General		
Topic Area: Board Governance		Attendance: Open To All
<p>Digital Transformation for Boards brings you up-to-speed with the new digital landscape so you can make informed decisions and provide the best recommendations when evaluating digital opportunities and threats for your company.</p> <p>You will develop a better understanding of the competencies and behaviors required to successfully lead in an environment characterized by digital disruption.</p> <p>This course will help you:</p> <ul style="list-style-type: none">• Grasp the potential impact of digital technologies on your company's performance• Understand the new competitive dynamics disrupting your industry• Identify the competencies and behaviors needed to lead successfully in a digital age• Be prepared to advise and support your management on digital transformation <p>Note: This event is a hybrid format (may attend in-person in Lausanne, Switzerland or virtually).</p>		<p>Fees</p> <p>CHF 6,600</p> <p>Contact</p> <p>Michael Wade, Program Director Phone: +41 (0)21 618 0111</p> <p>Email</p> <p>michael.wade@imd.org</p>
Link: https://www.imd.org/dtb/digital-transformation-for-board-members/		

Conference : Spring Conference		Start Date: May 10, 2022
Organizer: State Association of County Retirement Systems (SACRS)		End Date: May 13, 2022
Location: San Diego, California	Alternative Date(s) & Location(s) N/A	
Difficulty: General		
Topic Area: General		Attendance: Open To All
<p>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.</p> <p>See the website for more information about the conference.</p>		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 : Redefining Fixed Income Forum

Start Date: May 10, 2022

Organizer: Institutional Investor

End Date: May 11, 2022

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

Allocators' concerns on inflation, interest rates, duration, and yield have all remained top of mind. As fixed income is looking to rebound, investors seem to be looking more closely than ever at private debt market. And their funds seem to be following. Will this lead to an environment of fixed income private markets strategies versus fixed income public markets strategies as opposed to private markets AND public markets? Only time can tell. (With a lot of pundits opining in the meantime.)

But with an increasing interest in niche fixed income sectors, are investors looking at new or existing manager? It is also time to discuss the incorporation of ESG in fixed income portfolio and how investors due diligence process has evolved.

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/8th-Annual-Redefining-Fixed-Income-Forum>

Seminar : Strategy Governance for Boards

Start Date: May 13, 2022

Organizer: Institute for Management Development (IMD) Business School

End Date: May 14, 2022

Location: On-line

Alternative Date(s) & Location(s) Nov 21 - 22 2022, On-line

Difficulty: General

Topic Area: Board Governance

Attendance: Open To All

This event will enable you to play a meaningful, advisory role in the governance of your firm's corporate strategy within the context of an increasingly digital landscape.

Specifically the program will help participants:

- Understand the role of boards in strategy formulation and validation
- Ensure that board governance mechanisms are connected to their firm's strategy
- Monitor their firm's strategy effectively within the context of a 'digital' age
- Strike the right balance between growing today's business and investing in emerging opportunities

See the website for more information about the program.

Fees

CHF 6,600

Contact

Didier Cossin,
Program Director
Phone: +41 (0)21 618 0111

Email

didier.cossin@imd.org

Link: <https://www.imd.org/sgb/strategy-governance-board-training/>

Seminar : Corporate Governance: Developing Exceptional Board Leaders

Start Date: May 16, 2022

Organizer: Columbia Business School

End Date: May 20, 2022

Location: On-line

Alternative Date(s) & Location(s) Oct 19 - 21 2022, New York, New York

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

The Corporate Governance Program equips executives and professionals who currently serve or are interested in serving on corporate boards with the knowledge required to excel as stewards of shareholders that promote long-term and sustainable value creation.

Drawing on thought leadership from world-renowned experts at Columbia Business School and leading practicing directors, this program integrates academic research with a deep understanding of the emerging issues that boardrooms face. The program devotes one day entirely to emerging issues in the field of corporate governance, such as CEO succession plans, shareholder activism, the disruptive impact of technology and cyber risk, and the topic of diversity and inclusion. Program participants interact with round tables of top US directors, moderated by a Columbia Business School faculty expert in an engaging format.

For more information, please visit the website.

Fees

\$6,550 (virtual)
\$7,750 (in-person)

Contact

Yoon Lee
Director, Learning Solutions
+1 212-854-3390

Email

yoan.lee@gsb.columbia.edu

Link: <https://www8.gsb.columbia.edu/execed/program-pages/details/2548/CGP#overview>

Conference : Trustee Education Seminar

Start Date: May 21, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 22, 2022

Location: Washington, District of Columbia

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: <http://www.ncpers.org/teds>

Conference : Accredited Fiduciary (NAF) Program

Start Date: May 21, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 22, 2022

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) Oct 22 - 23 2022, Nashville, Kentucky

Difficulty: General

Topic Area: General

Attendance: Members Only

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

Module 1 – Governance and the Board's Role

Module 2 – Investment and Finance

Module 3 – Legal, Risk Management and Communication

Module 4 – Human Capital

See the website for more information about the program.

Fees

Not yet available

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

Early bird discount of \$200

Contact

Alyssa Carlson

Phone: 202-624-1456

Fax: 202-624-1439

Email

registration@ncpers.org

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

Conference : Annual Conference and Exhibition

Start Date: May 22, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 25, 2022

Location: Washington, District of Columbia

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 23, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: May 24, 2022

Location: On-line

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

\$1,800 - non-members
\$1,580 - members

Early bird discount of \$300 if registered by Apr. 5, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/virtual-conferences/Pages/washington-legislative-updated-virtual-conference.aspx>

Seminar : Global Asset Allocation

Start Date: May 31, 2022

Organizer: BCA Research

End Date: May 31, 2022

Location: On-line

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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:

- 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.

The course comprises two 1-hour sessions per week for 4 weeks (Tuesday and Thursday).

Fees

\$1,888

Contact

Phone: +1 514 499 9550
Toll-free: 1 800 724 2942

Email

academy@bcaresearch.com

Link: <https://info.bcaresearch.com/bca-eacademy>

Conference : Annual Conference

Start Date: June 05, 2022

Organizer: Government Finance Officers Association (GFOA)

End Date: June 08, 2022

Location: Austin, Texas

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 : Certificate of Achievement in Public Plan Policy - Part I

Start Date: June 06, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: June 07, 2022

Location: Santa Monica, California

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.

Fees

\$1,745 - non-member

\$1,445 - member

Early bird discount of \$300 if registered by Apr. 25, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/capp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-capp-pension-part-i-22a1.aspx>

Conference : Plan Sponsor National Conference

Start Date: June 08, 2022

Organizer: Plan Sponsor

End Date: June 10, 2022

Location: On-line

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

Not available. Please contact organizer.

Contact

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

Email

rebecca.fahey@issmediasolutions.com

Link: <https://web.cvent.com/event/4abceb7e-8666-499d-aca9-556300169b9e/summary?RefId=ABCD>

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

Start Date: June 08, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: June 09, 2022

Location: Santa Monica, California

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.

Fees

\$1,745 - non-member
\$1,525 - member
Early bird discount of \$300 if registered by Apr. 25, 2022.

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-22a2.aspx>

Seminar : Board and Risk for Boards		Start Date: June 13, 2022
Organizer: Institute for Management Development (IMD) Business School		End Date: June 14, 2022
Location: On-line	Alternative Date(s) & Location(s)	Jun 13 - 14 2022, Lausanne, Switzerland Nov 23 - 24 2022, On-line Nov 23 - 24 2022, Lausanne, Switzerland
Difficulty: General		
Topic Area: Risk Management		Attendance: Open To All
<p>Risk awareness and supervision are among the central duties of an effective board yet despite this important risk mission, many boards do not have a systematic risk approach.</p> <p>This program is an opportunity for board members to develop this approach and to upgrade to best-in-class risk work while differentiating it from executive risk thinking.</p> <p>This course will help you:</p> <ul style="list-style-type: none"> • Identify and assess your organization's risks • Analyze how strategic risk can be assessed and managed • Gain techniques for setting risk appetite • Access the risk behaviors of the board and management <p>Note: This event is a hybrid format (may attend in-person in Lausanne, Switzerland or virtually).</p>		<p>Fees</p> <p>CHF 6,600</p> <p>Contact</p> <p>Didier Cossin, Program Director Phone: +41 (0)21 618 0111</p> <p>Email</p> <p>didier.cossin@imd.org</p>
Link: https://www.imd.org/brb/risk-for-board-members/		

Seminar : Leadership Decision Making: Optimizing Organizational		Start Date: June 13, 2022
Organizer: Harvard Kennedy School		End Date: June 24, 2022
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>\$4,950</p> <p>Application deadline: May 23, 2022</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		

Conference : Discussion Forum

Start Date: June 19, 2022

Organizer: International Centre for Pension Management (ICPM)

End Date: June 22, 2022

Location: Toronto, Ontario, 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
Must register before May 19, 2022

Contact

Phone: 416.925.4153
Fax: 416.925.7377

Email

icpm@icpmnetwork.com

Link: <https://icpmnetwork.com/company/roster/companyRosterDetails.html?companyId=19681&companyRosterId=97>

Conference : Roundtable for Consultants & Institutional Investors

Start Date: June 20, 2022

Organizer: Institutional Investor

End Date: June 22, 2022

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.

See the website for more information about the conference.

Fees

Not available. Attendance is limited to investment executives from qualified investment consultants, pension funds, endowments and foundations. Please contact the conference

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iinow.com/Institutional-Investor-Conferences/Roundtable-Consultants-Institutional-Investors-2021>

Conference : Advanced Trustees and Administrators Institute

Start Date: June 27, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: June 29, 2022

Location: Orlando, Florida

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.

More information about the conference is not yet available.

Fees

\$2,225 - non-member
\$1,895 - member

Please see the website for more options.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/TrusteesAdmin/Pages/advanced-trustees-and-administrators-institute-2209.aspx>

Seminar : Public Pension Investment Management Program

Start Date: July 17, 2022

Organizer: State Association of County Retirement Systems (SACRS)

End Date: July 20, 2022

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. Agenda for the 2020 program is under development.

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

See the website for more information about the program.

Fees

Not yet available.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Seminar : Audit Committees in a New Era of Governance**Start Date:** July 20, 2022**Organizer:** Harvard Business School**End Date:** July 22, 2022**Location:** Boston, Massachusetts**Alternative Date(s) & Location(s)** Nov 16 - 18 2022, Boston, Massachusetts**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

\$6,800
Covers tuition, books,
accommodation & most meals

Contact

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

Email

executive_education@hbs.edu

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

Conference : Private Equity Exclusive**Start Date:** July 25, 2022**Organizer:** Pension Bridge**End Date:** July 26, 2022**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 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.

The Private Equity Exclusive annually attracts over 400 attendees from across North America, for a day and a half of knowledge sharing and networking.

Amid the COVID-19 pandemic and sustained volatility in the public markets, attendees will learn from the experts about the most important issues, outlooks, challenges, opportunities and trends expedited by the crisis which will shape the Private Equity Industry for today and the future.

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 : Annual Conference

Start Date: August 06, 2022

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: August 10, 2022

Location: Long Beach, California

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

Not yet available

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 21, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: August 23, 2022

Location: Los Angeles, California

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

Difficulty: General

Topic Area: Pension Plan Policy

Attendance: Open To All

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

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

More information about the conference is not yet available.

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: Certificate Series - Intro to Public Sector Benefits Administration		Start Date: August 23, 2022
Organizer: International Foundation of Employee Benefit Plans (IFEBP)		End Date: September 01, 2022
Location: On-line	Alternative Date(s) & Location(s) N/A	
Difficulty: General		
Topic Area: General		Attendance: Open To All
<p>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.</p> <p>Topics include:</p> <ul style="list-style-type: none"> - 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 <p>Please check the website for more information as it becomes available.</p>		<p>Fees</p> <p>\$1,595 - non-member \$1,275 - members</p> <p>Contact</p> <p>Tel: (888) 334-3327</p> <p>Email</p> <p>edreg@ifebp.org</p>
Link: https://www.ifebp.org/education/online-training-and-workshops/Pages/introduction-to-public-sector-benefits-administration-22V03VILT.aspx		

Seminar: General Principles of Pension Governance for Trustees		Start Date: August 29, 2022
Organizer: California Association of Public Retirement Systems (CALAPRS)		End Date: September 01, 2022
Location: TBD, California	Alternative Date(s) & Location(s) N/A	
Difficulty: General		
Topic Area: Board Governance		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 Governance courses.</p> <p>More information about the course is 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=1588240&group=		

Seminar : Private Equity: Investing and Creating Value		Start Date: September 12, 2022
Organizer: The Wharton School, University of Pennsylvania		End Date: September 16, 2022
Location: Philadelphia, Pennsylvania	Alternative Date(s) & Location(s) N/A	
Difficulty: Practitioner		
Topic Area: Investments		Attendance: Open To All
<p>In Private Equity: Investing and Creating Value, you will:</p> <ul style="list-style-type: none"> • 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 <p>See the website for more information about the program.</p>		<p>Fees</p> <p>\$13,650 Fees include accommodations and meals.</p> <p>Contact</p> <p>Phone: 215.898.1776 Toll-free: 1.800.255.3932</p> <p>Email</p> <p>execed@wharton.upenn.edu</p>
Link: http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/private-equity-investing-and-creating-value		

Seminar : Pension Governance Education Program		Start Date: September 19, 2022
Organizer: International Centre for Pension Management (ICPM)		End Date: September 22, 2022
Location: Toronto, Ontario, Canada	Alternative Date(s) & Location(s) N/A	
Difficulty: General		
Topic Area: Board Governance		Attendance: Open To All
<p>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.</p> <p>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.</p> <p>See the website for more information about the program.</p>		<p>Fees</p> <p>\$6,575 CAD</p> <p>Contact</p> <p>Phone: 416.925.4153 Fax: 416.925.7377</p> <p>Email</p> <p>icpm@icpmnetwork.com</p>
Link: https://icpmnetwork.com/site/events/pension-board-education		

Conference : PRI Academic Week

Start Date: September 19, 2022

Organizer: Principles for Responsible Investment (PRI)

End Date: September 23, 2022

Location: On-line

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

The event brings together the latest research and insights on responsible investment practices in an accessible way and aims to bridge the gap between academic researchers in sustainability and investors leading the way in RI.

The findings from peer-reviewed research are presented by their authors and discussed by investment practitioners and academics. It offers a unique opportunity for academics and investors to engage with each other, learn and discuss the latest insights.

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

Fees

€125 + 20% VAT

Contact

Meegan Marais

Phone: +44 (0)20 3714 3141

Email

events@unpri.org

Link: <https://www.unpri.org/research/call-for-papers-for-pri-academic-network-conference-2022/9700.article>

Conference : PRI Academic Network Conference

Start Date: September 19, 2022

Organizer: Principles for Responsible Investment (PRI)

End Date: September 23, 2022

Location: On-line

Alternative Date(s) & Location(s) Sep 20 - 21 2022, Barcelona, Spain

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

The PRI Academic Network is a vibrant and flourishing international community of over 11,000 academics and investment practitioners on ESG and investment. Academics are from RI-related disciplines, spanning accounting, economics, finance, law, management, sociology, and other subjects in the social and natural sciences.

The conference focuses on the latest research on responsible investment practices and as such it serves as an opportunity for academics and investors to engage with each other, learn and discuss the latest insights, and to network.

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

Fees

Not available. Please contact conference organizer.

Contact

Email

events@unpri.org

Link: <https://www.unpri.org/research/call-for-papers-for-pri-academic-network-conference-2022/9700.article>

Seminar : Certificate Series - Retirement Plan Basics

Start Date: September 19, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBC)

End Date: September 20, 2022

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

Topics for this course include:

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

Fees

\$1,815 - non-member
\$1,595 - member
Early bird discount of \$300 if registered by Aug. 8, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/certificateprograms/schedule/Pages/certificate-series-retirement-plan-basics-2257.aspx>

Conference : PRI in Person

Start Date: September 20, 2022

Organizer: Principles for Responsible Investment (PRI)

End Date: September 22, 2022

Location: On-line

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

Difficulty: Intermediate

Topic Area: ESG and ethical investing

Attendance: Open To All

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

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

See the website for more information about the conference.

Fees

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-and-online/8221.article>

Seminar : Certificate Series - Investment Basics

Start Date: September 23, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: September 24, 2022

Location: Washington, District of Columbia

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

Fees

\$1,815 - non-member
\$1,595 - member

Early bird discount of \$300 if registered by Aug. 8, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/certificateprograms/schedule/Pages/certificate-series-investment-basics-2273.aspx>

Conference : Delivering Alpha

Start Date: September 28, 2022

Organizer: Institutional Investor

End Date: September 28, 2022

Location: New York, New York

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

Difficulty: Intermediate

Topic Area: Investments

Attendance: By Invitation Only

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

See the website for more information about the conference.

Fees

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

Contact

Email

events@cnbc.com

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

Conference : Alternatives Conference

Start Date: October 01, 2022

Organizer: Pension Bridge

End Date: October 01, 2022

Location: Los Angeles, California

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 as it becomes available.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 561-455-2729

Fax: 561-258-8258

Email

bsemel@pensionbridge.com

Link: <https://withintelligence.com/events-calendar/>

Seminar : Investment Strategies and Portfolio Management

Start Date: October 10, 2022

Organizer: The Wharton School, University of Pennsylvania

End Date: October 14, 2022

Location: On-line

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

\$11,280

Contact

Phone: 215.898.1776

Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference : Annual Institutional Investor Real Estate Conference

Start Date: October 19, 2022

Organizer: Pension Real Estate Association (PREA)

End Date: October 21, 2022

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) Oct 18 - 20 2023, Boston, Massachusetts
Oct 22 - 24 2025, Washington, District of Columbia

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 : Trustees Masters Program

Start Date: October 22, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: October 23, 2022

Location: Las Vegas, Nevada

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

\$2,115 - non-member
\$1,895 - member

Early bird discount of \$300 if registered by Sept. 12, 2022

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/tmp/Pages/trustees-masters-program-tmp-22d2.aspx>

Conference : Public Safety Conference

Start Date: October 23, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 26, 2022

Location: Nashville, Tennessee

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

More information about the conference is not yet available.

Fees

Not yet available.
Previous years has been:
\$715

Contact

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

Email

registration@ncpers.org

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

Conference : Annual Employee Benefits Conference

Start Date: October 23, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBCP)

End Date: October 26, 2022

Location: Las Vegas, Nevada

Alternative Date(s) & Location(s) Oct 23 - 26 2022, On-line

Difficulty: General

Topic Area: General

Attendance: Members Only

The 68th 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 check the website for more information as it becomes available.

Fees

MEMBERS ONLY

Member: \$1,995 USD
Early bird discount of \$300 if
registered by Sept. 12, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebcp.org

Link: <https://www.ifebcp.org/education/usannual/Pages/annual-employee-benefits-conference-2201.aspx>

Seminar: Investment Decisions and Behavioral Finance

Start Date: October 26, 2022

Organizer: Harvard Kennedy School

End Date: October 28, 2022

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:
September 28, 2022.

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>

Seminar: CII & NYU Corporate Governance Bootcamp

Start Date: November 16, 2022

Organizer: Council of Institutional Investors

End Date: November 18, 2022

Location: New York, New York

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

CII is proud to offer Corporate Governance Bootcamp 2022, a premium executive education program developed in partnership with New York University School of Law's Institute for Corporate Governance and Finance.

Bootcamp 2022 is a two-track program, with an introductory session, Bootcamp Basics, for those who are new to corporate governance, and a deeper-dive curriculum to follow for governance professionals with some experience and participants who completed Bootcamp Basics. Instructors include faculty from NYU as well as seasoned practitioners

- Bootcamp Basics – Introduction to Corporate Governance: \$245 for CII members, \$495 for non-members.
- Program for Governance Professionals with Some Experience (beginners welcome, too): \$745 for CII members, \$945 for non-members.
- Combined Program: \$945 for CII members, \$1,395 for non-members.

Fees

Non-Members - \$1,395
Members - \$945
(Attendees may also attend only one out of the two sessions at a lower price)

Contact

Connor Garvey
(202) 822-0800

Email

connor@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=11/16/2022&eventid=161

Conference : Legislative Conference

Start Date: January 22, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: January 24, 2023

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: Legislation

Attendance: Members Only

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

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

Fees

Not yet available

Contact

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

Email

registration@ncpers.org

Link: <http://www.ncpers.org/legislative>

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 : 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/>

Terms and Conditions for use of the Cortex Report

1. The Cortex Report has been prepared for the exclusive use of the **San José Retirement Boards**, its board members, officers and staff, and may not be used or reproduced by any other parties.
2. Unless indicated otherwise, Cortex is not affiliated with any of the sponsors or organizers of the events listed in the Report. Also, the listing should not be taken as an endorsement of any of the events.
3. The Cortex Report is based on information provided by education event sponsors. Cortex is not responsible for any losses or damages due to reliance on any information that is published in this Report.

If you have any questions or comments on the Cortex Report, please feel free to contact us. Our contact information is as follows:

Cortex Applied Research Inc.
Tel: (416) 967-0252
E-mail: info@cortexconsulting.com