



Aon Consulting, Inc.

2026 Educational Conferences

City of San Jose Retirement Boards

January 2026

Table of Contents

2026 Events	1
2026 Index.....	9
Disclaimer	11



2026 Events

2026 Event Title – Organizer, Date, and Location	Overview and Audience
Annual Health Benefits Conference & Expo (HBCE) – International Foundation of Employee Benefit Plans (IFEBP) 01/20-22/2026 Ponte Vedra Beach, FL	This conference will focus on innovative strategies and best practices for improving health, wellness, and financial resilience in the workplace. Sessions will address aligning care for high-risk, high-cost individuals, integrating wellness and performance programs, designing sustainable benefits plans, and leveraging healthcare survey insights. Attendees will learn how to create inclusive benefits for Gen Z, support employee caregivers, and use AI to prevent opioid addiction. The conference will also cover legal issues related to self-funded health plans, lessons from health plan litigation, and the business case for adopting food-as-medicine initiatives. Additional topics include wellness program incentives, addressing obesity’s impact, building a culture of wellness, empowering HR through AI, and demonstrating the value of stability in managing employee crises. – Open to All
Website:	35th Annual Health Benefits Conference & Expo (HBCE)
Contact:	Contact Us
Fees:	Pricing information on main website.
Legislative Conference – National Conference on Public Employee Retirement Systems (NCPERS) 01/26-28/2026 Washington, DC	The NCPERS Legislative Conference & Policy Day offers public fund trustees and plan administrators a unique chance to advocate directly to Congress, the Administration, and federal agencies about public pension issues. On the first day, participants will engage with lawmakers, staff, and regulators to learn about upcoming legislative plans and pressing pension topics. The second day features scheduled congressional meetings, giving attendees the opportunity to influence public policy, build relationships, and strengthen their voice in Washington on behalf of the public pension community. – Open to All
Website	About the NCPERS Legislative Conference

2026 Event Title – Organizer, Date, and Location	Overview and Audience
Contact	info@ncpers.org
Fees	Not available. Contact organizer for more information.
<p>Private Equity: Investing and Creating Value – The Wharton School, University of Pennsylvania</p> <p>02/01-06/2026</p> <p>Philadelphia, PA</p>	<p>This Wharton program on private equity addresses both the sector’s recent surge in funding and the challenges it now faces, such as overheated markets, due diligence difficulties—especially in emerging regions—federal scrutiny over fee disclosures, and potential business contraction. Combining lectures from Wharton finance faculty and alumni leaders, the program covers key topics like asset pricing, cash flow forecasting with country risk, and specialized issues in emerging and frontier markets. Participants can tailor their learning to areas of interest, engage in case studies and group presentations, and gain insights from current research and industry experts. The curriculum is designed to provide a comprehensive understanding of the private equity landscape, practical tools used by managers, and firsthand perspectives from experienced Wharton alumni.</p> <p>– Open to All</p>
Website	Private Equity Program for Investing & Creating Value - Wharton
Contact	execed@wharton.upenn.edu
Fees	\$14,500
<p>Advanced Trustees and Administrators Institute – International Foundation of Employee Benefit Plans (IFEBP)</p> <p>02/23-25/2026</p> <p>Orlando, FL</p>	<p>Developed by active trustees, administrators, and professional advisors, this program offers a range of sessions on current issues, industry trends, legal and regulatory developments, and leading practices. The conference is structured to offer multiple session options while remaining small enough to support interaction among participants. Attendees gain information and perspectives to support the effective governance and administration of pension and health and welfare funds.</p> <p>– Open to All</p>
Website	Advanced Trustees and Administrators Institute
Contact	Contact Us
Fees	Through Jan. 12: \$1,795 (Member) \$2,125 (Non-member) After Jan. 12: \$2,095 (Member) \$2,425 (Non-member)

2026 Event Title – Organizer, Date, and Location	Overview and Audience
Winter Meeting – National Association of State Retirement Administrators (NASRA) 02/28 – 03/02/2026 Washington, DC	NASRA’s Winter Meeting gathers retirement system directors, senior staff, and policy leaders. The event starts with Sunday roundtable discussions and presentations tailored for system leadership to share insights and strategies. On Monday, the meeting expands to all NASRA members, featuring expert briefings on federal legislative and regulatory developments, forecasts for the coming year, and analysis of issues affecting public retirement systems nationwide. – Members Only
Website	NASRA
Contact	mary@nasra.org
Fees	Not available. Contact organizer for more information.
Communications & Member Services Summit – National Conference on Public Employee Retirement Systems (NCPERS) 03/02-04/2026 San Diego, CA	This multi-day summit brings together public pension communications and member services professionals for networking, case studies, and hands-on learning. Through keynotes, breakout sessions, and facilitated discussions, attendees will explore member engagement across generations, strategic communications planning, technology and pension administration systems, fraud prevention, financial literacy, AI and misinformation, and the future of communications. Participants can also join wellness and networking events, celebrate peer achievements, and potentially earn up to 14 Continuing Education hours toward fiduciary and state requirements. – Open to All
Website	Pension Communications and Member Services Professionals
Contact	events@ncpers.org
Fees	Fund/Stakeholder Member: \$800 Non-member (Fund/Stakeholder): \$1,500 Service Provider Member: \$1,000 Early-Bird Registration expires Feb. 16
General Assembly – California Association of Public Retirement Systems (CALAPRS) 03/08-11/2026 Carlsbad, CA	The CALAPRS General Assembly is an educational conference designed for retirement system trustees, senior staff, and annual sponsors of CALAPRS. This event features sessions on current and important topics, along with opportunities for networking. The agenda is created by a planning committee appointed by the CALAPRS Board of Directors.— Open to All

2026 Event Title – Organizer, Date, and Location	Overview and Audience
Website	General Assembly - California Association of Public Retirement Systems
Contact	info@calaprs.org
Fees	Not available. Contact organizer for more information.
Spring Conference – Council of Institutional Investors (CII) 03/09-11/2026 Washington, DC	<p>The CII Spring Conference brings together construction industry professionals for keynote presentations, workshops, panel discussions, and networking. Attendees learn about the latest research, technologies, and best practices, while engaging in professional development and strategic planning. The event also features exhibitor booths, awards, and opportunities for collaboration, making it a valuable forum for advancing industry knowledge and connections. More specific details will be available online as the conference approaches.</p> <p>– Members Only</p>
Website	CII Spring 2026 Conference: Washington, DC
Contact	michael@cii.org
Fees	Not available. Contact organizer for more information.
Defined Contribution East – Pensions & Investments 03/15-17/2026 Ft. Lauderdale, FL	<p>DC East 2026 is a defined contribution conference that convenes leading plan sponsors, consultants, asset managers, recordkeepers, and policymakers to examine best practices and the future of retirement savings. It features sponsor-only roundtables and expert-led sessions on regulation, investments, plan design, financial wellness, retirement income solutions, technology, workforce culture, and participant engagement, highlighted by the annual Eddy Awards.</p> <p>– Open to All</p>
Website	HOME - 2026 Defined Contribution East Coast Conference
Contact	sarah.tumolo@pionline.com
Fees	Plan Sponsors: Free Asset Managers & Service Providers: \$3,600 Financial Advisors & Consultants: \$1,500 Early bird discount expires Jan. 1, 2026
Investments Institute – International Foundation of Employee Benefit Plans (IFEBP)	<p>This two-day investment program for trustees focuses on navigating volatile markets and supporting long-term fund stability. Sessions cover macroeconomic trends, asset allocation,</p>

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04/22-23/2026 Austin, TX	private markets, real estate, infrastructure, and the growing role of AI, along with fixed income’s role in derisking and global diversification opportunities. The agenda also addresses benchmarking and fees, decumulation strategies for multiemployer plans, and includes interactive case study roundtables for peer-to-peer learning and practical application.
Website	Investments Institute
Contact	Contact Us
Fees	Through March 11: \$1,795 (Member) \$2,015 (Non-member) After March 11: \$2,095 (Member) \$2,315 (Non-member)
2026 Public Funds Roundtable – Institutional Investor 04/27-29/2026 Beverly Hills, CA	The 2026 Public Funds Roundtable will bring together senior investment officials from public pension funds and government investors for peer-to-peer discussions. Although the specific agenda for 2026 has not been detailed, previous roundtables have addressed topics such as global macro trends, asset allocation, investment strategy, governance, risk management, ESG, and technology innovation. – Asset Owners and Limited Number of Consultants
Website	Event - 2026 Public Funds Roundtable
Contact	luke.zammit@institutionalinvestor.com
Fees	Not available. Contact organizer for more information.
Annual Symposium – Pension Research Council, The Wharton School 04/30 – 5/01/2026 Philadelphia, PA	The 2026 PRC Symposium, with a theme of "Public Debt and Retirement Security," will take place from April 30 to May 1, 2026. The event will focus on the rising level of public debt in the United States and its effects on retirement systems globally. Speakers and panellists will examine how increasing public debt could influence savings, investment, and withdrawal strategies for retirement plan sponsors, insurers, and households. They will also explore the origins of this debt, the risks it poses to financial stability, and its potential impact on retirement planning and future outcomes. – Members Only
Website	All Conferences - Pension Research Council
Contact	prc@wharton.upenn.edu
Fees	Not available. Contact organizer for more information.

2026 Event Title – Organizer, Date, and Location	Overview and Audience
Spring Conference – State Association of County Retirement Systems (SACRS) 05/12-15/2026 Olympic Valley, CA	The SACRS Spring Conference gathers professionals from California county retirement systems for keynote presentations, educational sessions, and panels on investments, governance, and legislative updates. The event features networking opportunities, committee meetings, and professional development, keeping attendees informed about best practices and current issues in public pensions.— Open to All
Website	SACRS > Events > Spring Conference
Contact	sacrs@sacrs.org
Fees	Not available. Contact organizer for more information.
Trustee Educational Seminar (TEDS) – National Conference on Public Employees Retirement Systems (NCPERS) 05/16-17/2026 Las Vegas, NV	The Trustee Educational Seminar (TEDS) is a two-day program for new and novice public pension trustees, and a refresher for experienced trustees, focused on strengthening core knowledge of pensions and governance. The curriculum covers investing principles, actuarial basics, board policies, and key fiduciary responsibilities. Attendees can earn up to nine hours of continuing education credit (subject to change), and TEDS is recommended preparation for those pursuing the NCPERS Accredited Fiduciary (NAF) designation.
Website	NCPERS Pension Trustee Educational Seminar (TEDS)
Contact	info@ncpers.org
Fees	Not available. Contact organizer for more information.
Annual Conference – National Conference on Public Employees Retirement Systems (NCPERS) 05/17-20/2026 Las Vegas, NV	As the largest event hosted by NCPERS, the Annual Conference and Exhibition (ACE) delivers a unique experience with interactive sessions, workshops, and extensive networking opportunities. With expert speakers and up-to-date industry information, this conference is invaluable for trustees, administrators, government officials, and service providers looking to expand their expertise and professional relationships. – Members Only
Website	NCPERS Annual Conference & Exhibition
Contact	info@ncpers.org
Fees	Not available. Contact organizer for more information.

2026 Event Title – Organizer, Date, and Location	Overview and Audience
<p>Washington Legislative Update – International Foundation of Employee Benefit Plans (IFEBP) 05/18-19/2026 Washington, DC</p>	<p>Gain a clear understanding of the legislative and regulatory forces shaping your plans and their participants and leave with practical strategies to maintain compliance and prepare for the future. Learn best practices and solutions from subject matter experts, policymakers, and peers while exploring the latest issues that could affect your funds. This conference is designed for leaders responsible for plan compliance, oversight, and long-term sustainability.</p> <p>– Open to All</p>
<p>Website</p>	<p>Washington Legislative Update</p>
<p>Contact</p>	<p>Contact Us</p>
<p>Fees</p>	<p>Through April 6: \$1,495 (Member) \$1,715 (Non-member) After April 6: \$1,795 (Member) \$2,015 (Non-member)</p>
<p>Annual Conference – National Association of State Retirement Administrators (NASRA) 08/08-12/2026 Boston, MA</p>	<p>Exclusively for members, the conference offers a comprehensive agenda including general sessions, panel discussions, roundtables, and peer networking, all focused on public retirement system governance and operations. Attendees gain insights from nationally recognized experts on topics such as investment management, governance, economic trends, workforce issues, technology, cybersecurity, and legislative developments. The event also features interactive workshops for senior staff and CEOs, plus opportunities to explore innovative solutions from associate members and partners, making it a key forum for enhancing the management, sustainability, and security of U.S. public retirement systems.</p> <p>– Members Only</p>
<p>Website</p>	<p>NASRA</p>
<p>Contact</p>	<p>mary@nasra.org</p>
<p>Fees</p>	<p>Not available. Contact organizer for more information.</p>
<p>Public Pension Funding Forum – National Conference on Public Employee Retirement Systems (NCPERS) 08/16-18/2026 (Tentative) Chicago, IL</p>	<p>The Public Pension Funding Forum brings together trustees, administrators, policymakers, and experts to deepen understanding of trends and developments in public pension funding. Featuring presentations and debates by leading economists, including Nobel laureates, the event delivers objective analysis, research, and practical case studies on funding adequacy and reform initiatives. Attendees gain insights into the fiscal, political, and economic forces shaping pension systems, learn to distinguish rhetoric from fact, and explore solutions for sustainable funding. The Forum is designed for a</p>

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	wide range of stakeholders—including pension fund officials, legislators, the investment community, and researchers—and focuses on advancing educational programs and research to support the long-term health of public pension plans.
Website	About NCPERS Public Pension Funding Forum
Contact	info@ncpers.org
Fees	Not available. Contact organizer for more information.



2026 Index

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2026		
01/20/2026	Ponte Vedra Beach, FL	Annual Health Benefits Conference & Expo (HBCE) – International Foundation of Employee Benefit Plans (IFEBP)
01/26/2026	Washington, DC	Legislative Conference – National Conference on Public Employee Retirement Systems (NCPERS)
02/01/2026	Philadelphia, PA	Private Equity: Investing and Creating Value – The Wharton School, University of Pennsylvania
02/23/2026	Orlando, FL	Advanced Trustees and Administrators Institute – International Foundation of Employee Benefit Plans (IFEBP)
02/28/2026	Washington, DC	Winter Meeting – National Association of State Retirement Administrators (NASRA)
03/02/2026	San Diego, CA	Communications & Member Services Summit – National Conference on Public Employee Retirement Systems (NCPERS)
03/08/2026	Carlsbad, CA	General Assembly – California Association of Public Retirement Systems (CALAPRS)
03/09/2026	Washington, DC	Spring Conference – Council of Institutional Investors (CII)
03/15/2026	Ft. Lauderdale, FL	Defined Contribution East – Pensions & Investments
04/22/2026	Austin, TX	Investments Institute – International Foundation of Employee Benefit Plans (IFEBP)
04/27/2026	Beverly Hills, CA	2026 Public Funds Roundtable – Institutional Investor
04/30/2026	Philadelphia, PA	Annual Symposium – Pension Research Council, The Wharton School
05/12/2026	Olympic Valley, CA	Spring Conference – State Association of County Retirement Systems (SACRS)
05/16/2026	Las Vegas, NV	Trustee Educational Seminar (TEDS) – National Conference on Public Employees Retirement Systems (NCPERS)



Date	Location	2026 Event and Organizer
05/17/2026	Las Vegas, NV	Annual Conference – National Conference on Public Employees Retirement Systems (NCPERS)
05/18/2026	Washington, DC	Washington Legislative Update – International Foundation of Employee Benefit Plans (IFEBP)
08/08/2026	Boston, MA	Annual Conference – National Association of State Retirement Administrators (NASRA)
08/16/2026	Chicago, IL	Public Pension Funding Forum – National Conference on Public Employee Retirement Systems (NCPERS)



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