



The Cortex Report

Customized for the

San José Retirement Boards

January 2024

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Introduction to The Cortex Report

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

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

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

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Event Listings

Seminar : Leadership Decision Making: Optimizing Organizational

Start Date: January 08, 2024

Organizer: Harvard Kennedy School

End Date: January 19, 2024

Location: On-line

Alternative Date(s) & Location(s) Jun 23 - 28 2024, Cambridge, Massachusetts

Difficulty: Intermediate

Topic Area: Leadership

Attendance: Open To All

Wise judgment and effective decision-making have always been essential skills for leaders across all professional settings. Today, leaders have access to mountains of data from myriad sources. The question is, how can they leverage this abundance of information to make smarter decisions?

Leadership Decision Making (Online) features hands-on learning experiences that help leaders like you improve decision analysis and leadership effectiveness. During this ten-day intensive online program, you'll discover how to recognize biases in judgment that affect even the most intelligent individuals and to incorporate structured decision-making techniques empirically shown to enhance decision making. You'll also receive customized, confidential feedback on your decision-making style.

See the website for more information about the program.

Fees

\$6,400

Application deadline:
December 18, 2023.

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

Conference : Legislative Conference

Start Date: January 22, 2024

Organizer: National Conference on Public Employee Retirement Systems

End Date: January 24, 2024

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

ServiceProviderMember\$1050
Please see the website for all registration options.
Early bird discount of \$200 for registration by Jan 5 '24.

Contact

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

Email

registration@ncpers.org

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

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/>

Conference : Annual Health Benefits Conference & Expo

Start Date: January 29, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: January 31, 2024

Location: Clearwater, Florida

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

Difficulty: General

Topic Area: Healthcare Management

Attendance: Open To All

HBCE is one of the nation's premier sources for employee health benefits and wellness education. In times of change, having real-life examples and proven solutions is paramount to help guide your decision making. Addressing current topics revolving around cost-containment strategies, compliance initiatives and population health management, this program is a vital part of health benefits and wellness planning. Join your peers to get the latest updates and information that can make a positive impact on your organization.

For more information, visit the website.

Fees

Early Bird Rate: \$625
Corporate Rate: \$725

Please visit the website for more options.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/schedule/Pages/health-benefits-conference-and-expo-hbce.aspx>

Conference : Winter Meeting

Start Date: February 24, 2024

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: February 26, 2024

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: General

Attendance: Members Only

The winter meeting of NASRA retirement system directors and staff is held typically the last weekend in February or the first weekend in March, in Washington, DC, for a Sunday afternoon of roundtable discussions and presentations. The following day, all NASRA members are invited to hear analysis, forecasts, and overviews of current federal legislative and regulatory activities.

Please visit the website for details.

Fees

Members Only
Please contact organizer for details.

Contact

Mary Hiatte
Tel: 202-624-1418

Email

mary@nasra.org

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

Conference : Annual Conference

Start Date: February 26, 2024

Organizer: National Institute on Retirement Security (NIRS)

End Date: February 27, 2024

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Members Only

The National Institute on Retirement Security is a non-profit research and education organization established to contribute to informed policymaking by fostering a deep understanding of the value of retirement security to employees, employers, and the economy as a whole. Located in Washington, D.C., the organization has a diverse membership of organizations interested in retirement security issues such as employee benefit plans, state or local agencies that manage retirement plans, trade associations, financial services firms, and other retirement service providers.

See the website for more information about the conference.

Fees

No charge for members.

Contact

Nicole Dascenzo
Manager of Membership Services
Phone: 202-457-8190

Email

membership@nirsonline.org

Link: <https://www.nirsonline.org/events/nirs-annual-conference/>

Conference : General Assembly

Start Date: March 02, 2024

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 05, 2024

Location: Palm Springs, California

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

Difficulty: General

Topic Area: General

Attendance: Members Only

The California Association of Public Retirement Systems (CALAPRS) sponsors educational forums for sharing information and exchanging ideas among trustees and staff of California public retirement systems to enhance their ability to administer public pension plan benefits and manage investments consistent with their fiduciary responsibility. CALAPRS carries out its mission through an annual conference called the General Assembly, round table meetings for discussion of topics of interest, and the annual Principles of Pension Management course.

The General Assembly is an educational conference for retirement system trustees, senior staff, and annual sponsors of CALAPRS.

More information about the conference is available exclusively to CALAPRS member systems and sponsors. Please visit the website and log in.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 415-764-4860
Toll-free: 1-800-RETIRE-0
Fax: 415-764-4915

Email

info@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1449786&group=>

Conference : Health Care Management Conference

Start Date: March 04, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: March 05, 2024

Location: San Diego, California

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

Difficulty: General

Topic Area: Healthcare Management

Attendance: Open To All

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

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

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Spring Conference

Start Date: March 04, 2024

Organizer: Council of Institutional Investors

End Date: March 06, 2024

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) Mar 10 - 12 2025, Brooklyn, New York

Difficulty: General

Topic Area: Corporate Governance

Attendance: Members Only

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

See website for agenda.

Fees

Members with bundled memberships - \$0
Members - \$195
Non-members - \$295
See the website for details.

Contact

Kylund Arnold
Phone: 202.822.0800

Email

kylund@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=3/4/2024&eventid=146

Seminar : Private Equity: Investing and Creating Value

Start Date: March 10, 2024

Organizer: The Wharton School, University of Pennsylvania

End Date: March 15, 2024

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Sep 8 - 13 2024, Philadelphia, Pennsylvania

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

\$13,950
Fees include accommodations and meals.

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: <http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/private-equity-investing-and-creating-value>

Conference : PREA Spring Conference

Start Date: March 21, 2024

Organizer: Pension Real Estate Association (PREA)

End Date: March 22, 2024

Location: Nashville, Tennessee

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

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

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

Contact

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

Email

amy@prea.org

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

Conference : Pension Bridge Annual

Start Date: April 15, 2024

Organizer: Pension Bridge

End Date: April 17, 2024

Location: San Francisco, California

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

Difficulty: Intermediate

Topic Area: Investments

Attendance: Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together attendees from North America's largest investors and global asset managers, its conferences offer an intimate environment to strengthen relationships, discuss market trends and challenges, and refresh your knowledge of the investment industry.

Please visit the website for more details.

Fees

Please contact the conference organizer.

Contact

Phone: 561-455-2729
Fax: 561-258-8258

Email

bsemel@pensionbridge.com

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

Seminar : Investment Strategies and Portfolio Management

Start Date: April 15, 2024

Organizer: The Wharton School, University of Pennsylvania

End Date: April 19, 2024

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Oct 14 - 18 2024, Philadelphia, Pennsylvania

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:

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

See the website for more information about the program.

Fees

\$13,250

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference : Public Funds Roundtable

Start Date: April 29, 2024

Organizer: Institutional Investor

End Date: May 01, 2024

Location: Los Angeles, California

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

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

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

Fees

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

Contact

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

Email

kstorfer@institutionalinvestor.com

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

Conference : Washington Legislative Update

Start Date: May 06, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: May 07, 2024

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: Legislation

Attendance: Open To All

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

Fees

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Spring Conference

Start Date: May 07, 2024

Organizer: State Association of County Retirement Systems (SACRS)

End Date: May 10, 2024

Location: Los Angeles, California

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

See the website for more information about the conference.

Fees

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

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : Plan Sponsor National Conference

Start Date: May 15, 2024

Organizer: Plan Sponsor

End Date: May 17, 2024

Location: Salt Lake City, Utah

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

Difficulty: General

Topic Area: General

Attendance: By Invitation Only

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

Please see the website for more information.

Fees

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

Early bird discount of \$300

Contact

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

Email

rebecca.fahey@jssmediasolutions.com

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

Conference : Trustee Education Seminar

Start Date: May 18, 2024

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 19, 2024

Location: Seattle, Washington

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

Difficulty: General

Topic Area: Board Governance

Attendance: Members Only

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

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

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

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

Fees

Fund/Stakeholder: \$700

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

Contact

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

Email

registration@ncpers.org

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

Conference : Accredited Fiduciary (NAF) Program

Start Date: May 18, 2024

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 19, 2024

Location: Seattle, Washington

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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

See the website for more information about the program.

Fees

Fund Members/Stakeholders: \$1,100

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

Contact

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

Email

registration@ncpers.org

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

Conference : Annual Conference and Exhibition

Start Date: May 19, 2024

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 22, 2024

Location: Seattle, Washington

Alternative Date(s) & Location(s) May 18 - 21 2025, Denver, Colorado
May 17 - 20 2026, Las Vegas, Nevada

Difficulty: General

May 16 - 19 2027, New York, New York

Topic Area: General

Attendance: Members Only

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

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

For more information, please visit the website.

Fees

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

Contact

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

Email

registration@ncpers.org

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

Conference : Annual Conference

Start Date: June 09, 2024

Organizer: Government Finance Officers Association (GFOA)

End Date: June 12, 2024

Location: Orlando, Florida

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

Please check website for updates.

Fees

Not available. Please contact conference organizer.

Contact

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

Email

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

Conference : Advanced Trustees and Administrators Institute

Start Date: June 24, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: June 26, 2024

Location: San Diego, California

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

Please visit the website for more details.

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Seminar : Audit Committees in a New Era of Governance

Start Date: July 17, 2024

Organizer: Harvard Business School

End Date: July 19, 2024

Location: Boston, Massachusetts

Alternative Date(s) & Location(s) Nov 20 - 22 2024, 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

\$7,500
Covers tuition, books, accommodation & most meals

Contact

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

Email

executive_education@hbs.edu

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

Conference : Annual Conference

Start Date: August 03, 2024

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: August 07, 2024

Location: Pittsburgh, Pennsylvania

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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

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

Fees

Please contact conference organizer.

Contact

Mary Hiatte
Phone: 202.624.1418

Email

mary@nasra.org

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

Conference : Public Pension Funding Forum

Start Date: August 18, 2024

Organizer: National Conference on Public Employee Retirement Systems

End Date: August 20, 2024

Location: Palm Springs, California

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

Difficulty: General

Topic Area: Pension Plan Policy

Attendance: Open To All

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

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

Please see the website for more information about the conference.

Fees

Not yet available.

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

Contact

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

Email

registration@ncpers.org

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

Conference : Fall Conference

Start Date: September 09, 2024

Organizer: Council of Institutional Investors

End Date: September 11, 2024

Location: Brooklyn, New York

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Members Only

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

See website for agenda.

Fees

No charge for members.
Please visit website for details.

Contact

Kylund Arnold
Phone: 202.822.0800

Email

kylund@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=9/9/2024&eventid=134

Seminar : Certificate Series - Investment Basics

Start Date: September 16, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: September 17, 2024

Location: Nashville, Tennessee

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

Topics include:

- Investment terms
- Risk and return
- Stocks, bonds and mutual funds
- Investment benchmarks
- Portfolio management and asset allocation
- Contemporary investment issues
- Economic considerations
- Tax considerations
- Sources of information

Please visit the website for more details.

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Seminar : Certificate Series - Retirement Plan Basics

Start Date: September 18, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: September 19, 2024

Location: Nashville, Tennessee

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

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

Topics for this course include:

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

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Seminar : Pension Governance Education Program

Start Date: October 01, 2024

Organizer: International Centre for Pension Management (ICPM)

End Date: October 04, 2024

Location: Toronto, Ontario, Canada

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

Difficulty: General

Topic Area: Board Governance

Attendance: Open To All

The Pension Governance Education Program (PGEP) is a unique international governance program designed for board members of large pension funds and long-horizon investment institutions around the globe.

Organized by ICPM and Rotman Executive Programs at the University of Toronto, the program instills best practices in key areas such as organizational mission, fiduciary duties, investment styles, risk management and human resources management, including compensation.

See the website for more information about the program.

Fees

\$9,380 CAD

Please see the website for all registration options.

Contact

Phone: 416.925.4153

Fax: 416.925.7377

Email

icpm@icpmnetwork.com

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

Conference : Discussion Forum

Start Date: October 06, 2024

Organizer: International Centre for Pension Management (ICPM)

End Date: October 06, 2024

Location: Toronto, Ontario, Canada

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

Difficulty: Advanced

Topic Area: General

Attendance: By Invitation Only

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

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

Please visit the website for details.

Fees

\$6,575 CAD

Contact

Phone: 416.925.4153

Fax: 416.925.7377

Email

icpm@icpmnetwork.com

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

Conference : PRI in Person

Start Date: October 07, 2024

Organizer: Principles for Responsible Investment (PRI)

End Date: October 10, 2024

Location: Toronto, Ontario, Canada

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

Difficulty: Intermediate

Topic Area: ESG and ethical investing

Attendance: Open To All

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

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

See the website for more information about the conference.

Fees

\$2,750 USD

Please see the website for all registration options.

Contact

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

Email

jo.wackrill@unpri.org

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

Conference : Annual Institutional Investor Real Estate Conference

Start Date: October 23, 2024

Organizer: Pension Real Estate Association (PREA)

End Date: October 25, 2024

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) Oct 22 - 24 2025, Boston, Massachusetts

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

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

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

More information about the conference is not yet available.

Fees

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

Contact

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

Email

amy@prea.org

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

Conference : Program for Advanced Trustee Studies (PATS)

Start Date: October 26, 2024

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 27, 2024

Location: Washington, District of Columbia

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

Difficulty: Intermediate

Topic Area: Board Governance

Attendance: Members Only

This program is designed for advanced trustees who seek a more intensive, in-depth learning experience. Held annually in conjunction with the Annual Conference & Exhibition, each year's program will focus on two topics of particular importance to pension plan trustees, enabling participants to dig deeper and fully explore issues with their counterparts from around the nation. Topics may include ethics, legal developments, and alternative investments, among other timely themes.

The program, developed more than a decade ago in consultation with Harvard Law School, is formatted to foster dialogue and interaction among attendees.

PATS attendees can earn up to eight (8) hours of continuing education credits.

Fees

MEMBERS ONLY EVENT
Early-Bird Before Sept.20:
Fund/Stakeholder: \$855
After September 20:
Fund/Stakeholder: \$1055

Contact

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

Email

registration@ncpers.org

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

Conference : Public Safety Conference

Start Date: October 27, 2024

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 30, 2024

Location: Palm Springs, California

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

Please see the website for more information.

Fees

Service Provider: \$1,190

Please see the website for all registration options.

Contact

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

Email

registration@ncpers.org

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

Conference : Annual Employee Benefits Conference

Start Date: November 10, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: November 13, 2024

Location: San Diego, California

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

Difficulty: General

Topic Area: General

Attendance: Members Only

The 70th Annual Employee Benefits Conference is the largest gathering of multiemployer and public employee benefit plan representatives. This event offers you the opportunity to network with your peers, be surrounded by industry experts and learn the latest in the industry so you can make the most informed decisions on behalf of your funds.

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

Please visit the website for more details.

Fees

MEMBERS ONLY EVENT
Member: \$2,095 USD

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

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