



The Cortex Report

Customized for the

San José Retirement Boards

July 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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May 18, 2025	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference and Exhibition	Denver, Colorado	22	<i>New</i>

Event Listings

Seminar: Public Pension Investment Management Program

Start Date: July 14, 2024

Organizer: State Association of County Retirement Systems (SACRS)

End Date: July 17, 2024

Location: Berkeley, California

Alternative Date(s) & Location(s) Jul 13 - 16 2025, Berkeley, California

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

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

Please see the website for all registration options.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

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 : Private Equity Exclusive

Start Date: July 22, 2024

Organizer: Pension Bridge

End Date: July 24, 2024

Location: Chicago, Illinois

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

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

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

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 561-455-2729

Email

info@pensionbridge.com

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

Seminar : Advanced Investments Management

Start Date: July 22, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: July 24, 2024

Location: San Francisco, California

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

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

This program is designed to build upon what is learned in the Portfolio Concepts and Management program or participants' existing knowledge base and experience. The program is for individuals who have a solid grasp of investment management fundamentals and seek to learn more. Topics include:

- Introduction and Performance Analysis
- Advanced Bond Management
- Advanced Asset Allocation
- Evaluation of Managers
- Real Estate in a Pension Fund Portfolio
- Alternative Investments: A Discussion and Overview of Hedge Funds
- International Investing
- Pension Fund Valuation in the New World of Risk
- Investment Policy

See website for more information about the program.

Fees

\$6,780 - non-members
\$6,450 - IFEBP members
\$300 discount for registration by Jun 10, 2024

Contact

Phone: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/wharton/Pages/advanced-investment-management-2463.aspx>

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

Start Date: July 30, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: July 31, 2024

Location: Boston, Massachusetts

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

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

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

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

Please visit the website for more details.

Fees

\$1,770 - non-member
\$1,595 - member

Early bird discount of \$300 if registered by Jun 18, 2024.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

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

Start Date: August 01, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: August 02, 2024

Location: Boston, Massachusetts

Alternative Date(s) & Location(s) Nov 9 - 10 2024, Las Vegas, Nevada

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

Expanding upon the fundamental knowledge gained in Part I, the Certificate in Employee Pensions - Part II addresses the elements of plan design, investments, improvement strategies and emerging issues so you can be fully equipped to make the necessary decisions for your plans.

The structure of the CAPPP® program is flexible. Part II of the Certificate in Employee Pensions can be taken prior to Part I to accommodate your schedule. To earn your certificate both Part I and Part II must be completed along with a take-home exam.

Topics include: plan design, investments, business improvement strategies, and emerging issues.

Please visit the website for more details.

Fees

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

Early bird discount of \$300 if registered by Jun 12, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: [https://www.ifebp.org/education---events/educational-program-schedule/certificate-of-achievement-in-public-plan-policy-\(cappp\)-pensions-part-i/event-overview](https://www.ifebp.org/education---events/educational-program-schedule/certificate-of-achievement-in-public-plan-policy-(cappp)-pensions-part-i/event-overview)

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: Boston, Massachusetts

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

Difficulty: General

Topic Area: Pension Plan Policy

Attendance: Open To All

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

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

Please see the website for more information about the conference.

Fees

Not yet available.

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

Contact

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

Email

registration@ncpers.org

Link: <https://www.ncpers.org/funding-forum>

Seminar : General Principles of Pension Governance for Trustees

Start Date: August 26, 2024

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: August 29, 2024

Location: San Francisco, California

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

Difficulty: General

Topic Area: Board Governance

Attendance: Members Only

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

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

register@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1816797&group=>

Conference : Responsible Investment Forum

Start Date: September 04, 2024

Organizer: Private Equity International

End Date: September 05, 2024

Location: San Francisco, California

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

Difficulty: Intermediate

Topic Area: ESG and ethical investing

Attendance: Members Only

The Responsible Investment Forum brings together the most sophisticated institutional investors, fund managers, consultants and highly recognized associations to discuss effective ESG strategies that balances the world's sustainability with enhanced returns on investments.

ESG issues are at the heart of all PEI's editorial coverage, with our reporters consistently following and scrutinizing the ways in which managers in the US are adopting responsible investment practices and what LPs are looking for as they consider investing in private equity. PEI continues to prove itself as a thought-leader in this area, and is at the forefront of covering the growth of ESG in North American private equity.

Please see the website for more information.

Fees

For fund and asset managers, and developers.

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

Contact

P: 212 645 1919

Email

erin.w@peimedia.com

Link: <https://www.peievents.com/en/event/pei-responsible-investment-forum-san-francisco/>

Seminar : Private Equity: Investing and Creating Value

Start Date: September 08, 2024

Organizer: The Wharton School, University of Pennsylvania

End Date: September 13, 2024

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Feb 2 - 7 2025, 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

\$14,350
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 : 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---events/certificate-programs/certificate-series/investment-basics>

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---events/certificate-programs/certificate-series/retirement-plan-basics>

Conference : Fixed Income & Credit

Start Date: September 24, 2024

Organizer: Pensions & Investments

End Date: September 24, 2024

Location: Chicago, Illinois

Alternative Date(s) & Location(s) Sep 26 2024, New York, New York

Difficulty: General

Topic Area: Investments

Attendance: Open To All

Investors need assets that provide returns in a low-yield environment. Recent years have seen a major shift into private credit, strong interest in unconstrained fixed income, and growing interest in emerging markets and quant strategies. This conference will provide a survey of fixed income assets and strategies, and how they fit into a risk profile.

This event will survey the fixed income market from triple A to Z with thought leaders tackling the major questions that face investors as they look to get more out of their fixed income allocations.

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Elayne Glick
Audience Development Director
Phone: (212) 210-0247

Email

eglick@pionline.com

Link: <https://web.cvent.com/event/59fa0faa-0021-4feb-ac0e-099133c110c1/summary?RefId=2024FIPISite>

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 : Fall Conference

Start Date: October 02, 2024

Organizer: Journal of Investment Management

End Date: October 04, 2024

Location: Cambridge, Massachusetts

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

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

This conference will cover topics from how the biggest pension fund in the world is dealing with this issue to comments from a lead author of the recent authoritative UN Report to quantitative analytics which are useful in managing climate change and other ESG portfolios. Included are practical strategies to cope with climate change mandates.

This event is co-hosted with the UCSD Rady School of Management.

Please see the website for more information about the conference.

Fees

Not available. Please contact conference organizer.

Contact

Phone: (925) 299-7800

Fax: (925) 299-7815

Email

customerservice@joim.com

Link: <https://joim.com/conference-series/>

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) Jun 1 2025, London, UK
Oct 5 2025, San Francisco,

Difficulty: Advanced

Topic Area: General

Attendance: By Invitation Only

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

Please visit the website for details.

Fees

\$6,575 CAD

Contact

Phone: 416.925.4153

Fax: 416.925.7377

Email

icpm@icpmnetwork.com

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

Conference : PRI in Person

Start Date: October 08, 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

Non-Signatory: \$2,895 USD
Signatory: \$2,195 USD
Please see the website for all registration options including early bird rates.

Contact

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

Email

jo.wackrill@unpri.org

Link: <https://pip2024.unpri.org/toronto/>

Conference : Roundtable for Consultants & Institutional Investors

Start Date: October 08, 2024

Organizer: Institutional Investor

End Date: October 09, 2024

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

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

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

See the website for more information about the conference.

Fees

Not available.

Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iinow.com/memberships/2024-consultants-roundtable>

Conference : Sustainable Finance Policy Conference

Start Date: October 08, 2024

Organizer: Principles for Responsible Investment (PRI)

End Date: October 08, 2024

Location: Toronto, Ontario, Canada

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

Leading policymakers, regulators, regulatory affairs professionals and investors will come together for a one-day in-person event dedicated to sustainable finance policy, in the run up to the flagship PRI in Person conference.

This event will be an opportunity to discuss ongoing sustainable finance policy reforms, policy effectiveness and address challenges in policy frameworks to bridge the gap towards sustainability outcomes such as the Paris agreement and the SDGs.

The Policy Conference will include sessions on: Shifting the baseline on sustainable finance: strengths and challenges of different policy approaches around the world, and the value of global alignment; Stewardship, duties and policy engagement: the key reforms to empower the pursuit of sustainability outcomes; and Piloting an economy-wide transition: connecting finance and industrial policy.

Please visit the website for more details.

Fees

Not available. Please contact conference organizer.

Contact

Will Martindale

Email

will.martindale@unpri.org

Link: <https://www.unpri.org/all-events-and-webinars/sustainable-finance-policy-conference-2024/12241.article>

Conference : Trustees' Roundtable

Start Date: October 11, 2024

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: October 11, 2024

Location: San Jose, 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.

Agenda not yet available. More information about the conference will be available exclusively to CALAPRS member systems and sponsors. Please visit the website and log in.

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

register@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1814730&group=>

Seminar : Investment Strategies and Portfolio Management

Start Date: October 14, 2024

Organizer: The Wharton School, University of Pennsylvania

End Date: October 18, 2024

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Apr 14 - 18 2025, Philadelphia, Pennsylvania

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:

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

See the website for more information about the program.

Fees

\$13,500 USD

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference : Alternatives Conference

Start Date: October 16, 2024

Organizer: Pension Bridge

End Date: October 17, 2024

Location: New York, New York

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

Please check the website for more information.

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

bsemel@pensionbridge.com

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

Conference : 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 : Accredited Fiduciary (NAF) Program

Start Date: October 26, 2024

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 27, 2024

Location: Palm Springs, California

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

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: \$1055
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/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 : Trustees Masters Program

Start Date: November 09, 2024

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: November 10, 2024

Location: San Diego, California

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

\$2,215 - non-member
\$1,915 - members

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---events/educational-program-schedule/trustees-masters-program/event-home>

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>

Conference : Fall Conference

Start Date: November 12, 2024

Organizer: State Association of County Retirement Systems (SACRS)

End Date: November 15, 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

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

Please see the website for all registration options.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : Delivering Alpha

Start Date: November 13, 2024

Organizer: Institutional Investor

End Date: November 13, 2024

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.cnbc.com/delivering-alpha-2024/>

Conference : University of Virginia Investing Conference

Start Date: November 14, 2024

Organizer: Darden School of Business

End Date: November 14, 2024

Location: Charlottesville, Virginia

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

Difficulty: Intermediate

Topic Area: Investments

Attendance: Open To All

The Richard A. Mayo Center for Asset Management at the UVA Darden School of Business invites you to join them for the 16th annual University of Virginia Investing Conference (UVIC). This year, UVIC will explore investing in a world of slowing economic growth, geopolitical stress, and a rapid rise in artificial intelligence applications. We will focus attention on how these issues may converge to shape the future of the global economy and markets. Program speakers will also detail approaches and ideas for how investors might position themselves for success over the coming years.

Please see the website for more information about the conference.

Fees

General Admission: \$125

Please see the website for all registration options.

Contact

Stephanie Swing
Operations and Administrative
Coordinator
Phone: +1-434-924-6814

Email

SwingS@arden.virginia.edu

Link: <https://www.darden.virginia.edu/mayo-center/events/uvic>

Seminar : CII & NYU Corporate Governance Bootcamp

Start Date: November 14, 2024

Organizer: Council of Institutional Investors

End Date: November 15, 2024

Location: New York, New York

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

This course a premium executive education program developed in partnership with New York University School of Law's Institute for Corporate Governance and Finance.

Bootcamp is designed as a two-day program, with the first day of instruction covering foundations of corporate governance and the second day covering advanced topics in stewardship. Instructors include faculty from NYU as well as seasoned practitioners

Please see the website for more information and all registration options.

Fees

Non-Members - \$3,500
Members - \$2,800

Please see the website for all registration options.

Contact

Kylund Arnold
(202) 822-0800

Email

kylund@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?eventid=212

Conference : RI Digital: USA

Start Date: December 03, 2024

Organizer: Responsible Investor

End Date: December 04, 2024

Location: New York, New York

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

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

Please visit website for agenda.

Fees

No charge for asset owner and investment consultants.

Contact

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

Email

hamish@responsible-investor.com

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

Conference : Defined Benefit Investment Forum

Start Date: December 06, 2024

Organizer: Canadian Investment Review

End Date: December 06, 2024

Location: Toronto, Ontario, Canada

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

Difficulty: General

Topic Area: Pension Plan Policy

Attendance: By Invitation Only

The conference is an exclusive, educational forum that brings together senior representatives of Canadian pension plan sponsors, as well as representatives from the academic, custodial and money management communities.

Participation is by invitation only. For more information on the DB Investment Forum, please email alison.webb@tc.tc, publisher of Canadian Investment Review for consideration.

Canadian Investment Review is Canada's leading forum for academics, institutional investors and industry practitioners to exchange ideas on the capital markets, investment and economic theory and the related sociology and demographics. To that end, it publishes articles that offer original ideas based on existing literature and brings new insight to relevant themes and practices within the institutional investment community.

Please visit the website for details.

Fees

No charge for qualified DB decision-makers and investment consultants.
Please contact the conference organizer to register.

Contact

Alison Webb, Publisher
Phone: 416-847-8578

Email

alison.webb@tc.tc

Link: <https://www.benefitscanada.com/microsite/defined-benefit-investment-forum-2024/>

Conference : Global Roundtable 2024

Start Date: December 10, 2024

Organizer: Responsible Investor

End Date: December 11, 2024

Location: On-line

Alternative Date(s) & Location(s) Dec 10 - 11 2024, Geneva, Switzerland

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

UNEP FI is hosting its 18th Global Roundtable as a hybrid event on 10-11 December in Geneva, Switzerland and online. The flagship event will be held as part of Building Bridges (9-12 December), and focus on accelerating practical approaches to setting and implementing targets in areas including net zero, nature, impact, pollution, human rights, and financial inclusion to help achieve the Sustainable Development Goals. UNEP FI's biennial Global Roundtable is also a pivotal event for finance industry action, providing thousands of finance professionals the opportunity to collaborate with peers and learn from global leaders on issues including the net zero transition, nature, impact, pollution, human rights and financial inclusion to help achieve the Sustainable Development Goals. Building Bridges is a powerful movement that brings 2500+ attendees from 100+ countries from the finance and corporate sectors, governments, civil society, academia, and sustainable development communities to Geneva annually, to shape the global sustainable finance agenda and build a bridge towards a global economic model that meets the needs of a sustainable and just society. Please see the website for more information regarding this conference.

Fees

No charge.

Contact

Email

grt@unepfi.org

Link: <https://www.unepfi.org/events/unep-fi-global-roundtable-2024/>

Seminar : Leadership Decision Making: Optimizing Organizational

Start Date: January 06, 2025

Organizer: Harvard Kennedy School

End Date: January 17, 2025

Location: On-line

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

Difficulty: Intermediate

Topic Area: Leadership

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

\$6,400

Application deadline:
December 16, 2024

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

Conference : Winter Meeting

Start Date: March 01, 2025

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: March 03, 2025

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 : General Assembly

Start Date: March 01, 2025

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 04, 2025

Location: Napa, 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=1842373&group=>

Conference : Spring Conference

Start Date: March 10, 2025

Organizer: Council of Institutional Investors

End Date: March 12, 2025

Location: Brooklyn, New York

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Members Only

CII Spring Conference & 40th Anniversary Celebration

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=3/10/2025&eventid=147

Conference : PREA Spring Conference

Start Date: March 26, 2025

Organizer: Pension Real Estate Association (PREA)

End Date: March 27, 2025

Location: Dallas, Texas

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 : Annual Conference and Exhibition

Start Date: May 18, 2025

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 21, 2025

Location: Denver, Colorado

Alternative Date(s) May 17 - 20 2026, Las Vegas, Nevada

& Location(s) May 16 - 19 2027, New York, New York

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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

For more information, please visit the website.

Fees

Fund/Stakeholder: \$1,130

Please see the website for all registration options.

Early bird discount of \$200 for registration by Apr 26, '25

Contact

Alyssa Carlson

Phone: 202-624-1456

Fax: 202-624-1439

Email

registration@ncpers.org

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

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

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