



The Cortex Report

Customized for the

San José Retirement Boards

May 2023

This page is intentionally left blank

Introduction to The Cortex Report

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

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

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

This page is intentionally left blank

Table of Contents

Start Date	Primary Organizer	Event	Location	Page	
May 01, 2023	International Foundation of Employee Benefit Plans (IFEBP)	Portfolio Concepts and Management	Philadelphia, Pennsylvania	1	
May 03, 2023	Plan Sponsor	Plan Sponsor National Conference	Orlando, Florida	1	
May 05, 2023	California Association of Public Retirement Systems (CALAPRS)	Trustees' Roundtable	On-line	2	New
May 09, 2023	State Association of County Retirement Systems (SACRS)	Spring Conference	San Diego, California	2	
May 09, 2023	Pensions & Investments	Private Markets	Miami, Florida	3	
May 09, 2023	BCA Research	Global Asset Allocation	On-line	3	
May 20, 2023	National Conference on Public Employee Retirement Systems (NCPERS)	Trustee Education Seminar	New Orleans, Louisiana	4	
May 20, 2023	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	New Orleans, Louisiana	4	
May 21, 2023	Government Finance Officers Association (GFOA)	Annual Conference	Portland, Oregon	5	
May 21, 2023	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference and Exhibition	New Orleans, Louisiana	5	
May 22, 2023	International Foundation of Employee Benefit Plans (IFEBP)	Washington Legislative Update	Washington, District of	6	
May 23, 2023	Institutional Investor	Redefining Fixed Income Forum	Chicago, Illinois	6	
Jun 01, 2023	The Conference Board	Leadership Development Conference	On-line	7	
Jun 01, 2023	International Corporate Governance Network (ICGN)	ICGN Governance, Stewardship & Sustainability Course	On-line	7	New
Jun 04, 2023	International Centre for Pension Management (ICPM)	Discussion Forum	Montreal, Quebec,	8	
Jun 05, 2023	Harvard Kennedy School	Leadership Decision Making: Optimizing Organizational Performance (Online)	On-line	8	
Jun 13, 2023	BCA Research	Global Asset Allocation	On-line	3	
Jun 19, 2023	International Foundation of Employee Benefit Plans (IFEBP)	Advanced Trustees and Administrators Institute	San Diego, California	9	New
Jul 16, 2023	State Association of County Retirement Systems (SACRS)	Public Pension Investment Management Program	Berkeley, California	9	
Jul 18, 2023	International Foundation of Employee Benefit Plans (IFEBP)	Alternative Investment Strategies	San Francisco, California	10	
Jul 19, 2023	Harvard Business School	Audit Committees in a New Era of Governance	Boston, Massachusetts	10	
Jul 24, 2023	Pension Bridge	Private Equity Exclusive	Chicago, Illinois	11	New
Jul 24, 2023	International Foundation of Employee Benefit Plans (IFEBP)	Certificate of Achievement in Public Plan Policy - Pension Part I	Chicago, Illinois	11	
Jul 26, 2023	International Foundation of Employee Benefit Plans (IFEBP)	Certificate of Achievement in Public Plan Policy - Pension Part II	Chicago, Illinois	12	
Jul 28, 2023	International Foundation of Employee Benefit Plans (IFEBP)	Certificate Series - Retirement Plan Basics	Chicago, Illinois	12	

Table of Contents

Start Date	Primary Organizer	Event	Location	Page	
Aug 05, 2023	National Association of State Retirement Administrators (NASRA)	Annual Conference	Broomfield, Colorado	13	
Aug 20, 2023	National Conference on Public Employee Retirement Systems (NCPERS)	Public Pension Funding Forum	Chicago, Illinois	13	
Aug 28, 2023	California Association of Public Retirement Systems (CALAPRS)	General Principles of Pension Governance for Trustees	San Francisco, California	14	
Sep 10, 2023	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia, Pennsylvania	14	New
Sep 11, 2023	Council of Institutional Investors	Fall Conference	Long Beach, California	15	
Sep 18, 2023	International Foundation of Employee Benefit Plans (IFEBC)	Certificate Series - Retirement Plan Basics	Las Vegas, Nevada	12	
Sep 20, 2023	International Foundation of Employee Benefit Plans (IFEBC)	Certificate Series - Investment Basics	Las Vegas, Nevada	15	
Sep 25, 2023	International Centre for Pension Management (ICPM)	Pension Governance Education Program	Toronto, Ontario, Canada	16	New
Sep 30, 2023	International Foundation of Employee Benefit Plans (IFEBC)	Trustees Masters Program	Boston, Massachusetts	16	
Sep 30, 2023	International Foundation of Employee Benefit Plans (IFEBC)	Certificate of Achievement in Public Plan Policy - Pension Part I	Boston, Massachusetts	11	
Oct 01, 2023	International Foundation of Employee Benefit Plans (IFEBC)	Annual Employee Benefits Conference	Boston, Massachusetts	17	
Oct 01, 2023	Harvard Kennedy School	Leadership Decision Making: Optimizing Organizational Performance (Online)	Cambridge, Massachusetts	8	New
Oct 04, 2023	Institutional Investor	Roundtable for Consultants & Institutional Investors	Chicago, Illinois	17	
Oct 15, 2023	Journal of Investment Management	Fall Conference	San Francisco, California	18	New
Oct 16, 2023	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia, Pennsylvania	18	New
Oct 18, 2023	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Boston, Massachusetts	19	
Oct 21, 2023	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	Las Vegas, Nevada	4	
Oct 22, 2023	National Conference on Public Employee Retirement Systems (NCPERS)	NCPERS FALL Conference	Las Vegas, Nevada	19	
Oct 25, 2023	Harvard Kennedy School	Investment Decisions and Behavioral Finance	Cambridge, Massachusetts	20	
Oct 27, 2023	California Association of Public Retirement Systems (CALAPRS)	Trustees' Roundtable	On-line	2	
Nov 03, 2023	Darden School of Business	University of Virginia Investing Conference	Charlottesville, Virginia	20	New
Nov 07, 2023	State Association of County Retirement Systems (SACRS)	Fall Conference	Los Angeles, California	21	
Nov 07, 2023	Council of Institutional Investors	CII & NYU Corporate Governance Bootcamp	New York, New York	21	New
Nov 15, 2023	Harvard Business School	Audit Committees in a New Era of Governance	Boston, Massachusetts	10	New
Dec 06, 2023	Responsible Investor	RI Digital: USA	New York, New York	22	

Table of Contents

Start Date	Primary Organizer	Event	Location	Page	
Jan 22, 2024	Institutional Real Estate, Inc. (IREI)	2024 Visions, Insights & Perspectives (VIP) Americas	Carlsbad, California	22	
Mar 02, 2024	California Association of Public Retirement Systems (CALAPRS)	General Assembly	Rancho Mirage, California	23	New
Mar 10, 2024	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia, Pennsylvania	14	New

Event Listings

Conference : Portfolio Concepts and Management**Start Date:** May 01, 2023**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** May 04, 2023**Location:** Philadelphia, Pennsylvania**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** Investments**Attendance:** Open To All

This course provides the core principles of portfolio theory and investment performance measurement, offering practical tools and experiences to help you make reliable investment management decisions. This program offers lecture/discussion sessions, problem solving exercises and small-group case study sessions in a 3½-day format. Grow confidence in your ability to evaluate investments with a broad, fundamental understanding of investment products and practices. This program is intended for those who have little experience with investment-related course work. Fiduciaries from both defined benefit and defined contribution plans who represent various industries, sizes and geographic areas (United States and Canada), including: Multiemployer and public plan trustees; Administrators and fund staff; Human resources and benefits professionals; Corporate officers and executives; Finance personnel; Investment professionals.

Please visit the website for more details.

Fees

\$6,635 - non-member
\$6,195 - member
Early bird discount of \$440 if registered by Mar. 30, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

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

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

Please see the website for more information.

Fees

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

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

Contact

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

Email

rebecca.fahey@issmediasolutions.com

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

Conference : Trustees' Roundtable**Start Date:** May 05, 2023**Organizer:** California Association of Public Retirement Systems (CALAPRS)**End Date:** May 05, 2023**Location:** On-line**Alternative Date(s)
& Location(s)** Oct 27 2023, On-line**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=1706385&group=>

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

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

See the website for more information about the conference.

Fees

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

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : Private Markets

Start Date: May 09, 2023

Organizer: Pensions & Investments

End Date: May 10, 2023

Location: Miami, Florida

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

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

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

Email

eglick@pionline.com

Link: <https://web.cvent.com/event/82159d99-7537-4d5a-a1dd-c235a0af177e/summary?RefId=2022PMPISite>

Seminar : Global Asset Allocation

Start Date: May 09, 2023

Organizer: BCA Research

End Date: May 18, 2023

Location: On-line

Alternative Date(s) & Location(s) Jun 13 - 22 2023, On-line

Difficulty: General

Topic Area: Investments

Attendance: Open To All

BCA has been an independent provider of global investment research for over 65 years. Markets are, to use Paul Samuelson's phrase, "micro efficient but macro inefficient." CIOs, asset allocators, and investment professionals often struggle to find a practical way to construct optimal multi-asset portfolios. This course will help you:

- Learn methods and strategies to harvest alpha from these macro inefficiencies.
- Identify portfolio objectives as a starting point for successful asset allocation strategies.
- Match the macro environment with the appropriate asset allocation strategies - often the most challenging part of the investment process.
- Become more effective at interpreting how BCA's Global Asset Allocation team sees the world; an important input given the increasingly complex macro environment.
- Gain a better understanding of how to develop and execute asset allocation strategies, and how investors should be positioned given prevailing market conditions.

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

Fees

On-line: \$2,000 USD
In-person: \$2,500 USD

Contact

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

Email

academy@bcaresearch.com

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

Conference : Trustee Education Seminar

Start Date: May 20, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 21, 2023

Location: New Orleans, Louisiana

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

Difficulty: General

Topic Area: Board Governance

Attendance: Members Only

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

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

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

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

Fees

Not yet available.

Contact

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

Email

registration@ncpers.org

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

Conference : Accredited Fiduciary (NAF) Program

Start Date: May 20, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 21, 2023

Location: New Orleans, Louisiana

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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

See the website for more information about the program.

Fees

Not yet available

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

Early bird discount of \$200

Contact

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

Email

registration@ncpers.org

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

Conference : Annual Conference**Start Date:** May 21, 2023**Organizer:** Government Finance Officers Association (GFOA)**End Date:** May 24, 2023**Location:** Portland, Oregon**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Open To All

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

Please check website for updates.

Fees

Not available. Please contact conference organizer.

Contact

Tel:(312) 977-9700

Fax:(312) 977-4806

Email

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

Conference : Annual Conference and Exhibition**Start Date:** May 21, 2023**Organizer:** National Conference on Public Employee Retirement Systems**End Date:** May 24, 2023**Location:** New Orleans, Louisiana**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Members Only

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

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

For more information, please visit the website.

Fees

Not yet available.

Contact

Alyssa Carlson

Phone: 202-624-1456

Fax: 202-624-1439

Email

registration@ncpers.org

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

Conference : Washington Legislative Update

Start Date: May 22, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: May 23, 2023

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: Legislation

Attendance: Open To All

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

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Redefining Fixed Income Forum

Start Date: May 23, 2023

Organizer: Institutional Investor

End Date: May 24, 2023

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

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

The conference agenda is not yet available. See website for details.

Fees

Not available. Registration limited to "qualified individuals". Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iinow.com/Institutional-Investor-Forums/redefining-fixed-income-forum-2023>

Conference : Leadership Development Conference

Start Date: June 01, 2023

Organizer: The Conference Board

End Date: June 02, 2023

Location: On-line

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

Difficulty: General

Topic Area: Leadership

Attendance: Open To All

Resilient Leadership for Volatile Times

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

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

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

Fees

\$495 - non-members
Free - members

Contact

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

Email

customer.service@conferenceboard.org

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

Seminar : ICGN Governance, Stewardship & Sustainability Course

Start Date: June 01, 2023

Organizer: International Corporate Governance Network (ICGN)

End Date: June 08, 2023

Location: On-line

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

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

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

For more information, please visit the website.

Fees

£449 + 20% VAT - member
£699 + 20% VAT - non-member

Contact

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

Email

florence.doel@icgn.org

Link: <https://www.icgn.org/icgn-governance-stewardship-sustainability-course-june-2023>

Conference : Discussion Forum

Start Date: June 04, 2023

Organizer: International Centre for Pension Management (ICPM)

End Date: June 04, 2023

Location: Montreal, Quebec, Canada

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

Difficulty: Advanced

Topic Area: General

Attendance: By Invitation Only

Sunday, June 4, 2023 at 5:00 pm (Eastern Time Zone)

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

Please visit the website for details.

Fees

\$6,575 CAD

Contact

Phone: 416.925.4153

Fax: 416.925.7377

Email

icpm@icpmnetwork.com

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

Seminar : Leadership Decision Making: Optimizing Organizational

Start Date: June 05, 2023

Organizer: Harvard Kennedy School

End Date: June 16, 2023

Location: On-line

Alternative Date(s) & Location(s) Oct 1 - 6 2023, 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

\$6,200

Application deadline:
May15, 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 : Advanced Trustees and Administrators Institute

Start Date: June 19, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: June 21, 2023

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

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

Early bird discount of \$300 if registered by May 8, 2023.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/TrusteesAdmin/Pages/advanced-trustees-and-administrators-institute-2309.aspx>

Seminar : Public Pension Investment Management Program

Start Date: July 16, 2023

Organizer: State Association of County Retirement Systems (SACRS)

End Date: July 19, 2023

Location: Berkeley, California

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

Presented by the world-renowned faculty of UC Berkeley's Haas School of Business, Modern Investment Theory & Practice for Retirement Systems is a four-day course offering SACRS' members in-depth knowledge on today's successful investment models and strategies. You'll learn how to practically integrate these methods immediately into your own plan administration, advancing your skills and elevating the collective expertise of SACRS' membership. Completion of the course earns you a certificate of achievement from UC Berkeley. Agenda for the 2020 program is under development.

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

See the website for more information about the program.

Fees

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: Alternative Investment Strategies

Start Date: July 18, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: July 20, 2023

Location: San Francisco, California

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

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

Contact

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

Email

edreg@ifebp.org

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

Seminar: Audit Committees in a New Era of Governance

Start Date: July 19, 2023

Organizer: Harvard Business School

End Date: July 21, 2023

Location: Boston, Massachusetts

Alternative Date(s) & Location(s) Nov 15 - 17 2023, 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

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

Contact

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

Email

executive_education@hbs.edu

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

Conference : Private Equity Exclusive

Start Date: July 24, 2023

Organizer: Pension Bridge

End Date: July 26, 2023

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>

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

Start Date: July 24, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: July 25, 2023

Location: Chicago, Illinois

Alternative Date(s) & Location(s) Sep 30 - Oct 1 2023, Boston, Massachusetts

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

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

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

Please visit the website for more details.

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/capp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-capp-pension-part-i-23a1.aspx>

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

Start Date: July 26, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: July 27, 2023

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

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

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

Please visit the website for more details.

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/cappp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-cappp-pension-part-ii-23a2.aspx>

Seminar : Certificate Series - Retirement Plan Basics

Start Date: July 28, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: July 29, 2023

Location: Chicago, Illinois

Alternative Date(s) & Location(s) Sep 18 - 19 2023, Las Vegas, Nevada

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

Topics for this course include:

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

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Annual Conference

Start Date: August 05, 2023

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: August 09, 2023

Location: Broomfield, Colorado

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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

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

Fees

Please contact conference organizer.

Contact

Mary Hiatte
Phone: 202.624.1418

Email

mary@nasra.org

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

Conference : Public Pension Funding Forum

Start Date: August 20, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: August 22, 2023

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Pension Plan Policy

Attendance: Open To All

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

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

Please see the website for more information about the conference.

Fees

Not yet available.

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

Contact

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

Email

registration@ncpers.org

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

Seminar : General Principles of Pension Governance for Trustees	Start Date: August 28, 2023
Organizer: California Association of Public Retirement Systems (CALAPRS)	End Date: August 31, 2023
Location: San Francisco, California	Alternative Date(s) & Location(s) N/A
Difficulty: General	

Topic Area: Board Governance **Attendance:** Members Only

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

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

register@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1706484&group=>

Seminar : Private Equity: Investing and Creating Value	Start Date: September 10, 2023
Organizer: The Wharton School, University of Pennsylvania	End Date: September 15, 2023
Location: Philadelphia, Pennsylvania	Alternative Date(s) & Location(s) Mar 10 - 15 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 : Fall Conference

Start Date: September 11, 2023

Organizer: Council of Institutional Investors

End Date: September 13, 2023

Location: Long Beach, California

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Members Only

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

See website for agenda.

Fees

No charge for members.
Please visit website for details.

Contact

Kylund Arnold
Phone: 202.822.0800

Email

kylund@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=9/11/2023&eventid=119

Seminar : Certificate Series - Investment Basics

Start Date: September 20, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBCP)

End Date: September 21, 2023

Location: Las Vegas, Nevada

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

Topics include:

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

Please visit the website for more details.

Fees

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

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Seminar : Pension Governance Education Program**Start Date:** September 25, 2023**Organizer:** International Centre for Pension Management (ICPM)**End Date:** September 28, 2023**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 (PGE) 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

Early Bird Fee: \$8450 + HST before July 1st, 2022

Price increases to \$8,950 + HST on July 1st, 2022.

Contact

Phone: 416.925.4153

Fax: 416.925.7377

Email

icpm@icpmnetwork.com

Link: <https://connect.icpmnetwork.com/events/63f8da55f00c5f0007053b13/description>

Conference : Trustees Masters Program**Start Date:** September 30, 2023**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** October 01, 2023**Location:** Boston, Massachusetts**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Open To All

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

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

For more information, please visit the website.

Fees

\$2,170 - non-member

\$1,950 - members

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Annual Employee Benefits Conference

Start Date: October 01, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: October 04, 2023

Location: Boston, Massachusetts

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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

Please visit the website for more details.

Fees

FOR MEMBERS ONLY
Member: \$2,050 USD

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

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : Roundtable for Consultants & Institutional Investors

Start Date: October 04, 2023

Organizer: Institutional Investor

End Date: October 05, 2023

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

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

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

See the website for more information about the conference.

Fees

Not available.

Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

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

Conference : Fall Conference

Start Date: October 15, 2023

Organizer: Journal of Investment Management

End Date: October 16, 2023

Location: San Francisco, California

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/>

Seminar : Investment Strategies and Portfolio Management

Start Date: October 16, 2023

Organizer: The Wharton School, University of Pennsylvania

End Date: October 20, 2023

Location: Philadelphia, Pennsylvania

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:

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

See the website for more information about the program.

Fees

\$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 : Annual Institutional Investor Real Estate Conference

Start Date: October 18, 2023

Organizer: Pension Real Estate Association (PREA)

End Date: October 20, 2023

Location: Boston, Massachusetts

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

& 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

Not yet available.

Contact

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

Email

amy@prea.org

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

Conference : NCPERS FALL Conference

Start Date: October 22, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 25, 2023

Location: Las Vegas, Nevada

Alternative Date(s) N/A

& Location(s)

Difficulty: General

Topic Area: Finance

Attendance: Members Only

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

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

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

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

Fees

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

Contact

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

Email

registration@ncpers.org

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

Seminar : Investment Decisions and Behavioral Finance**Start Date:** October 25, 2023**Organizer:** Harvard Kennedy School**End Date:** October 27, 2023**Location:** Cambridge, Massachusetts**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** Investments**Attendance:** Open To All

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

The course will enable you to:

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

See the website for more information about the program.

Fees

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

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

Conference : University of Virginia Investing Conference**Start Date:** November 03, 2023**Organizer:** Darden School of Business**End Date:** November 03, 2023**Location:** Charlottesville, Virginia**Alternative Date(s) & Location(s)** N/A**Difficulty:** Intermediate**Topic Area:** Investments**Attendance:** Open To All

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

Fees

Free

Contact

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

Email

SwingS@darden.virginia.edu

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

Conference : Fall Conference

Start Date: November 07, 2023

Organizer: State Association of County Retirement Systems (SACRS)

End Date: November 10, 2023

Location: Los Angeles, California

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

See the website for more information about the conference.

Fees

Not yet available.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Seminar : CII & NYU Corporate Governance Bootcamp

Start Date: November 07, 2023

Organizer: Council of Institutional Investors

End Date: November 08, 2023

Location: New York, New York

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

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

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

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

Fees

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

Contact

Kylund Arnold
(202) 822-0800

Email

kylund@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=11/7/2023&eventid=178

Conference : RI Digital: USA

Start Date: December 06, 2023

Organizer: Responsible Investor

End Date: December 07, 2023

Location: New York, New York

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

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

Please visit website for agenda.

Fees

No charge for asset owner and investment consultants.

Contact

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

Email

hamish@responsible-investor.com

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

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

Start Date: January 22, 2024

Organizer: Institutional Real Estate, Inc. (IREI)

End Date: January 24, 2024

Location: Carlsbad, California

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: By Invitation Only

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

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

Fees

Not available. Please contact conference organizer.

Contact

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

Email

l.jaramillo@irei.com

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

Conference : General Assembly

Start Date: March 02, 2024

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 05, 2024

Location: Rancho Mirage, 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=>

Terms and Conditions for use of the Cortex Report

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

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

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