

A woman with dark hair, wearing glasses, a white lace top, and a tan blazer, stands in front of a large window. She is smiling and gesturing with her right hand while holding a tablet in her left. In the foreground, the back of a person's head and shoulders are visible, and another person's hand is seen writing on a notepad with a blue pen.

# Aon Consulting, Inc.

2025-2026 Educational Conferences

City of San Jose Retirement Boards

September 2025

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## 2025 Events

| 2025 Event Title — Organizer, Date, and Location                                                                                      | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                        |
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| <b>Influential Women in Institutional Investing (IWII) — Pensions &amp; Investments</b><br><b>09/18/2025</b><br><b>Chicago, IL</b>    | <p>IWII 2025 is a premier event focused on advancing gender equity in institutional investing. With women currently holding only 8.4% of global board chair positions and 6% of CEO roles, and full gender parity projected as far out as 2073, this conference aims to accelerate progress by convening influential women leaders to celebrate achievements, foster inclusion, and inspire change.</p> <p>— Open to All</p> |
| Website:                                                                                                                              | <a href="#">HOME - 2025 Influential Women in Institutional Investing</a>                                                                                                                                                                                                                                                                                                                                                     |
| Contact:                                                                                                                              | <a href="#">CONTACT - 2025 Influential Women in Institutional Investing</a>                                                                                                                                                                                                                                                                                                                                                  |
| Fees:                                                                                                                                 | <a href="#">Registration Items - 2025 Influential Women in Institutional Investing</a>                                                                                                                                                                                                                                                                                                                                       |
| <b>Fall Conference — California Retired County Employees Association (CRCEA)</b><br><b>09/28 - 10/1/2025</b><br><b>Pleasanton, CA</b> | <p>Usually feature presentations, workshops, and discussions focused on issues relevant to retired county employees, such as pension updates, legislative changes, health benefits, and retirement planning. Attendees often include retirees, association leaders, and guest speakers from related fields. More detailed information is available after registration and upon request.</p> <p>— Open to All</p>             |
| Website:                                                                                                                              | <a href="#">CRCEA - Alameda County 2025 Fall Conference</a>                                                                                                                                                                                                                                                                                                                                                                  |
| Contact:                                                                                                                              | Connie Land: <a href="mailto:landcon@comcast.net">landcon@comcast.net</a><br>Alicia Baptista: <a href="mailto:alicia.baptista@comcast.net">alicia.baptista@comcast.net</a>                                                                                                                                                                                                                                                   |
| Fees:                                                                                                                                 | See website.                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Trustees' Roundtable — California Association of Public Retirement Systems (CALAPRS)</b><br><b>10/03/2025</b>                      | <p>The CALAPRS Trustees Roundtable is a gathering for trustees of California public retirement systems focused on education, networking, and sharing best practices. The event typically features expert presentations on governance, fiduciary duties,</p>                                                                                                                                                                  |

| 2025 Event Title — Organizer, Date, and Location                                                                                                | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
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| <b>Virtual</b>                                                                                                                                  | <p>investment strategies, and regulatory updates, along with open discussions and peer-to-peer sharing. Trustees use these sessions to stay informed, discuss challenges, and connect with colleagues from other systems. Must register for agenda and more specific information.</p> <p>— Members Only</p>                                                                                                                                                                                                                                                                                                                                     |
| Website:                                                                                                                                        | <a href="#">California Association of Public Retirement Systems</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Contact:                                                                                                                                        | <a href="mailto:info@calaprs.org">info@calaprs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Fees:                                                                                                                                           | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Consultants &amp; Institutional Investors Roundtable – Fall — Institutional Investor</b><br><b>10/8-9/2025</b><br><b>Chicago, IL</b>         | <p>Institutional Investor's Roundtable for Consultants &amp; Institutional Investors will convene industry professionals to discuss the rapidly evolving investment landscape. Key topics include navigating persistent inflation and higher interest rates, adapting asset allocation strategies to ongoing market corrections, understanding the impact of transformative technological change, and responding to increased geopolitical tensions and regionalization in global markets. The event aims to address how these shifts are redefining investment approaches and the future of institutional portfolios.</p> <p>— Open to All</p> |
| Website:                                                                                                                                        | <a href="#">Event - Consultants &amp; Institutional Investors Roundtable</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Contact:                                                                                                                                        | <a href="#">Event - Consultants &amp; Institutional Investors Roundtable</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Fees:                                                                                                                                           | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Information Technology Roundtable — California Association of Public Retirement Systems (CALAPRS)</b><br><b>10/10/2025</b><br><b>Virtual</b> | <p>This conference brings together IT professionals from California public retirement systems to discuss technology trends, share best practices, and address common challenges. Attendees typically participate in presentations and group discussions on topics such as cybersecurity, system upgrades, data management, and regulatory compliance. The roundtable provides an opportunity for networking, problem-solving, and learning about new tools and solutions relevant to public pension IT operations. Must register for agenda and more specific information.</p> <p>— Members Only</p>                                            |
| Website:                                                                                                                                        | <a href="#">California Association of Public Retirement Systems</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Contact:                                                                                                                                        | <a href="mailto:info@calaprs.org">info@calaprs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

| 2025 Event Title — Organizer, Date, and Location                                                                                                         | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
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| Fees:                                                                                                                                                    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
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| <b>2025 CIO Influential Investors Forum and Industry Innovation Awards Dinner — Chief Investment Officer</b><br><b>10/16/2025</b><br><b>New York, NY</b> | <p>This event features a private idea exchange for emerging CIOs with experienced professionals, followed by lunch and a series of panels on modern portfolio theory, investment team building, operational due diligence, and portfolio complexity. Sessions cover topics such as integrating active and passive strategies, recruiting and motivating staff, and leveraging technology in operations. The day concludes with the annual Industry Innovation Awards Dinner where asset owners, asset managers, and service providers will be recognized for driving innovation in institutional investing.</p> <p>— Open to All</p> |
| Website:                                                                                                                                                 | <a href="#">2025 CIO Influential Investors Forum and Industry Innovation Awards Dinner   Chief Investment Officer</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Contact                                                                                                                                                  | <a href="mailto:carol.popkins@issmediasolution.com">carol.popkins@issmediasolution.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Fees:                                                                                                                                                    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
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| <b>Compliance Roundtable — California Association of Public Retirement Systems (CALAPRS)</b><br><b>10/17/2025</b><br><b>Virtual</b>                      | <p>The CALAPRS Compliance Roundtable is a meeting for compliance professionals from California public retirement systems to discuss regulatory issues, share best practices, and address compliance challenges. Participants typically engage in presentations and group discussions on topics such as new laws and regulations, audit processes, risk management, and reporting requirements. The roundtable also offers opportunities for networking, peer learning, and staying updated on developments affecting public pension compliance. Must register for agenda and more specific information.</p> <p>— Members Only</p>    |
| Website:                                                                                                                                                 | <a href="#">California Association of Public Retirement Systems</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Contact                                                                                                                                                  | <a href="mailto:info@calaprs.org">info@calaprs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Fees:                                                                                                                                                    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
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| <b>Investment Strategies and Portfolio Management — The Wharton School, University of Pennsylvania</b>                                                   | <p>Investment Strategies and Portfolio Management is a Wharton-led program designed for financial professionals seeking advanced, research-based approaches to investing. It covers a broad range of topics, including portfolio theory, bond management, hedge funds, and private equity, while providing</p>                                                                                                                                                                                                                                                                                                                       |

| 2025 Event Title — Organizer, Date, and Location                                                                                                                              | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| <b>10/20-24/2025;</b><br><b>Alternate Date: 04/20-24/2025</b><br><b>Philadelphia, PA</b>                                                                                      | <p>the latest tools for designing optimal portfolios and evaluating investment managers using new data. The program emphasizes risk management, especially in addressing rare, high-impact events ("tail risk") that standard volatility measures often miss and teaches participants how to identify early warning signs and manage such risks. Overall, it offers practical guidance from leading finance experts to help professionals navigate today's complex investment environment with greater confidence.</p> <p>— Open to All</p>                                                                 |
| Website:                                                                                                                                                                      | <a href="#">Investment Strategies and Portfolio Management – Wharton</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Contact                                                                                                                                                                       | <a href="mailto:execed@wharton.upenn.edu">execed@wharton.upenn.edu</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Fees:                                                                                                                                                                         | \$13,750                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Program for Advanced Trustee Studies (PATs) — National Conference on Public Employee Retirement Systems (NCPERS)</b><br><b>10/25-26/2025</b><br><b>Fort Lauderdale, FL</b> | <p>This two-day event equips public pension trustees with practical knowledge in real assets and cybersecurity. The first day covers real estate, infrastructure, and alternative investments, focusing on market trends, risks, and diversification, with interactive sessions to build oversight skills. The second day addresses cybersecurity fundamentals, board responsibilities, incident response, and risk mitigation, including hands-on simulations. Networking opportunities are provided throughout, ensuring trustees gain both expertise and valuable connections.</p> <p>— Members Only</p> |
| Website:                                                                                                                                                                      | <a href="#">Program for Advanced Trustee Studies (PATs)   NCPERS</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Contact                                                                                                                                                                       | <a href="mailto:info@ncpers.org">info@ncpers.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Fees:                                                                                                                                                                         | Must sign in to view fees.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Accredited Fiduciary (NAF) Program — National Conference on Public Employee Retirement Systems (NCPERS)</b><br><b>10/25-26/2025</b><br><b>Fort Lauderdale, FL</b>          | <p>The NCPERS Accredited Fiduciary (NAF) program gives pension trustees and administrators the essential knowledge for effective fiduciary leadership. Split into two parts—Governance &amp; Finance and Risk Management &amp; Human Capital—it covers board best practices, investment compliance, legal oversight, reputation management, and HR challenges. Completing both modules and passing the exam earns participants the Accredited Fiduciary (AF) designation, recognizing their expertise in public pension management.</p> <p>— Members Only</p>                                               |
| Website:                                                                                                                                                                      | <a href="#">NCPERS Accredited Fiduciary Program</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

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| Contact:                                                                                                                                                                      | <a href="mailto:info@ncpers.org">info@ncpers.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Fees:                                                                                                                                                                         | Before Oct. 10: \$900<br>After Oct. 10: \$1,100                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Fall Conference — National Conference on Public Employee Retirement Systems (NCPERS)</b><br><b>10/26-29/i2025</b><br><b>Fort Lauderdale, FL</b>                            | By attending the Fall Conference, participants can earn up to 13 continuing education hours toward Accredited Fiduciary (AF) recertification and state-mandated requirements. The event is accredited by the State Pension Review Board of Texas as a Minimum Educational Training sponsor for Texas public retirement systems. Conference highlights include educational tracks on finance, actuarial science, legislative, and legal topics, an exhibit hall showcasing service providers, and networking opportunities to connect and share best practices with industry colleagues.<br><br>— Fund/Stakeholder or Service Provider |
| Website:                                                                                                                                                                      | <a href="#">NCPERS Financial Actuarial Legislative Legal FALL Conference</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Contact                                                                                                                                                                       | <a href="mailto:info@ncpers.org">info@ncpers.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Fees:                                                                                                                                                                         | <a href="#">NCPERS FALL Conference Registration</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Intermediate Course in Retirement Plan Administration — California Association of Public Retirement Systems (CALAPRS)</b><br><b>11/05-07/2025</b><br><b>Costa Mesa, CA</b> | The Intermediate Course consists of interactive sessions focused on key topics commonly addressed in Board of Retirement meetings. By completing the course, you'll gain insight into the research and preparation behind agenda items, understand how these topics are presented to the Board, and learn how decisions are made. Participants are encouraged to engage actively through questions and small group discussions. Must register for agenda and more specific information.<br><br>— Members Only                                                                                                                         |
| Website:                                                                                                                                                                      | <a href="#">California Association of Public Retirement Systems</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Contact                                                                                                                                                                       | <a href="mailto:info@calaprs.org">info@calaprs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Fees:                                                                                                                                                                         | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Trustees Masters Program (TMP) — International Foundation of Employee Benefit Plans (IFEBP)</b><br><b>11/08-09/2025</b><br><b>Honolulu, HI</b>                             | The Trustees Masters Program (TMP) is an advanced educational series for experienced trustees seeking deeper insight into their roles and opportunities to collaborate with peers. Divided into two tiers, the program covers essential topics such as board governance, goal setting, partnering with plan professionals, effective communication, and investment performance.                                                                                                                                                                                                                                                       |



| 2025 Event Title — Organizer, Date, and Location                                                                                                                | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
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|                                                                                                                                                                 | <p>Participants engage in case studies, team exercises, and discussions to address real-world issues in investments, legal matters, accounting, health care, and retirement. The curriculum also includes trustee-to-trustee discussions and an open forum to tackle future challenges in the benefits industry. Completion of tier one earns a Certificate of Achievement, while tier two leads to the TMP pin, recognizing ongoing education and leadership in pension governance.</p> <p>— Trustees with 5+ years of experience and have attended at least two IFEBP conferences</p>                                                                                                                          |
| Website:                                                                                                                                                        | <a href="#">Trustees Masters Program (TMP)</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Contact                                                                                                                                                         | <a href="#">Contact Us</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Fees:                                                                                                                                                           | <p>Before Sep. 29: \$1,750-\$1,970<br/>After Sep. 29: \$2,050-\$2,270</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <p><b>Annual Employee Benefits Conference — International Foundation of Employee Benefit Plans (IFEBP)</b><br/><b>11/09-12/2025</b><br/><b>Honolulu, HI</b></p> | <p>The conference features over 120 educational sessions across ten specialized tracks, including administration, fiduciary responsibility, health and welfare, investments, retirement, and public plans, led by more than 200 experts. Attendees can join preconference workshops, tailored breakout sessions, and earn continuing education credits by attending in person, while keynote speakers address topics like overcoming adversity, economic outlooks, and human potential. The event also offers an exhibit hall with 200+ vendors, networking opportunities, and roundtables, with select sessions available virtually but CE credits limited to in-person participants.</p> <p>— Members Only</p> |
| Website:                                                                                                                                                        | <a href="#">71st Annual Employee Benefits Conference</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Contact                                                                                                                                                         | <a href="#">Contact Us</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Fees:                                                                                                                                                           | <p>Before Sep. 29: \$1,850<br/>After Sep. 29: \$2,150</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <p><b>Fall Conference — State Association of County Retirement Systems (SACRS)</b><br/><b>11/11-14/2025</b><br/><b>Huntington Beach, CA</b></p>                 | <p>The SACRS Fall Conference focuses on professional development and key issues for public retirement system professionals. The agenda includes certification training in disability, ethics, and sexual harassment prevention, as well as sessions on macroeconomic and market outlooks, geopolitics, AI's role in medicine, affordable housing investments, and asset allocation strategies. Attendees can participate in concurrent</p>                                                                                                                                                                                                                                                                       |



| 2025 Event Title — Organizer, Date, and Location                                                                        | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
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|                                                                                                                         | <p>breakouts for administrators, affiliates, attorneys, auditors, investments, operations, safety, and trustees, along with legislative updates and committee meetings. The conference concludes with a session on defined benefit pensions in public safety recruitment and the annual business meeting, providing continuing education opportunities and insights from industry leaders relevant to public pension governance and investment.</p> <p>— Open to All</p>                                                                                                                                                                                                                                                                                                                                                                                         |
| Website:                                                                                                                | <a href="#">SACRS &gt; Events &gt; Fall Conference</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Contact                                                                                                                 | <a href="mailto:sacrs@sacrs.org">sacrs@sacrs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Fees:                                                                                                                   | <a href="#">SACRS Fall Conference 2025 SACRS</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <p><b>Private Credit Forum — Institutional Investor</b></p> <p><b>11/18-19/2025</b></p> <p><b>Austin, TX</b></p>        | <p>Institutional Investor's Private Credit Series will bring together industry leaders at annual events in Austin, Chicago, and Toronto to explore global opportunities and challenges in private credit. With a focus on risk assessment, underwriting standards, and emerging credit strategies, the series will provide investors with essential insights and networking to navigate and capitalize on this rapidly growing asset class.</p> <p>—Open to All</p>                                                                                                                                                                                                                                                                                                                                                                                              |
| Website:                                                                                                                | <a href="#">Event - Private Credit Forum Texas</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Contact                                                                                                                 | <a href="mailto:Giorgio.tupini@institutionalinvestor.com">Giorgio.tupini@institutionalinvestor.com</a><br><a href="mailto:giana.mortellite@institutionalinvestor.com">giana.mortellite@institutionalinvestor.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Fees:                                                                                                                   | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <p><b>Public Funds Conference — Pensions &amp; Investments</b></p> <p><b>11/19-20/2025</b></p> <p><b>Austin, TX</b></p> | <p>The conference will address the challenges and innovations in institutional investing, focusing on balancing strategic and tactical approaches to asset allocation amid market uncertainty. Sessions will explore global diversification, evolving private equity fund structures, and the changing role of fixed income, while providing insights into governance models that support flexible portfolio management. Panels will discuss renewed interest in hedge funds and absolute return strategies, recalibrating growth assets, and how public funds can communicate value and attract talent. Attendees will engage in discussions on risk management, portfolio construction, and the future of public fund management, equipping investment professionals with actionable strategies for navigating a complex and dynamic investment landscape.</p> |

| 2025 Event Title — Organizer, Date, and Location                                                                                       | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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|                                                                                                                                        | — Asset Owners and Limited Number of Consultants                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Website:                                                                                                                               | <a href="#">HOME - 2025 Public Funds</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Contact                                                                                                                                | <a href="#">CONTACT - 2025 Public Funds</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Fees:                                                                                                                                  | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Legal Support Roundtable — California Association of Public Retirement Systems (CALAPRS)</b><br><b>11/20/2025</b><br><b>Virtual</b> | <p>The CALAPRS Legal Support Roundtable brings together legal staff from California public retirement systems to discuss current legal issues, share best practices, and address common challenges. Participants engage in collaborative discussions on topics like recent legislation, compliance, case law, member benefits, and governance. Overall, it provides a valuable forum for networking and staying informed on legal trends affecting public retirement systems. Must register for agenda and more specific information.</p> <p>— Members Only</p>                                                                                                                                                                             |
| Website:                                                                                                                               | <a href="#">California Association of Public Retirement Systems</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Contact                                                                                                                                | <a href="mailto:info@calaprs.org">info@calaprs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Fees:                                                                                                                                  | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>CII &amp; NYU Corporate Governance Bootcamp — Council of Institutional Investors</b><br><b>11/20-21/2025</b><br><b>New York, NY</b> | <p>This two-day conference features expert-led sessions on key topics in corporate governance, executive compensation, securities regulation, financial statement analysis, and proxy voting. Attendees learn about the importance of Delaware law, best practices for board decision-making and shareholder engagement, and strategies for interpreting financial and proxy statements. The agenda also covers say-on-pay analysis, activist investment approaches, insider trading, and boardroom perspectives, with interactive discussions and networking opportunities throughout. Overall, the event provides practical insights and updates on major trends and challenges in corporate law and governance.</p> <p>— Open to All</p> |
| Website:                                                                                                                               | <a href="#">CII-NYU School of Law: Corporate Governance Bootcamp</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Contact                                                                                                                                | <a href="mailto:events@cii.org">events@cii.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Fees:                                                                                                                                  | Members: \$2,900<br>Non-Members: \$3,650                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

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| <b>Investments Roundtable — California Association of Public Retirement Systems (CALAPRS)</b><br><b>11/21/2025</b><br><b>Virtual</b>                                   | <p>The CALAPRS Investments Roundtable brings together investment professionals from California public retirement systems to discuss market trends, asset allocation, risk management, and other key investment topics. Participants share best practices, review recent developments, and exchange ideas on manager selection and portfolio strategies in a collaborative setting. The event may feature guest speakers and provides valuable networking and learning opportunities for those managing public pension investments. Must register for agenda and more specific information.</p> <p>— Members Only</p>                                                                                                                         |
| Website:                                                                                                                                                               | <a href="https://calaprs.org">California Association of Public Retirement Systems</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Contact                                                                                                                                                                | <a href="mailto:info@calaprs.org">info@calaprs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Fees:                                                                                                                                                                  | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Advanced Course in Retirement Plan Administration — California Association of Public Retirement Systems (CALAPRS)</b><br><b>12/03/2025</b><br><b>Costa Mesa, CA</b> | <p>The CALAPRS Advanced Course in Retirement Plan Administration offers experienced pension professionals in-depth sessions on complex topics like plan design, funding, actuarial concepts, legal updates, and governance. The course features case studies, interactive discussions, and expert speakers, helping participants deepen their expertise and share best practices for effective public retirement plan management. Must register for agenda and more specific information.</p> <p>— Members Only</p>                                                                                                                                                                                                                          |
| Website:                                                                                                                                                               | <a href="https://calaprs.org">California Association of Public Retirement Systems</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Contact                                                                                                                                                                | <a href="mailto:info@calaprs.org">info@calaprs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Fees:                                                                                                                                                                  | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Wealth Insights Series – Miami — Aon</b><br><b>12/08-10/2025</b><br><b>Miami, FL</b>                                                                                | <p>The Aon Wealth Insights Miami Conference is a premier conference designed for asset owners, asset managers, investment service providers, and Aon colleagues to explore investment leadership in today's complex environment. Held at the Fontainebleau Hotel in Miami Beach, the event opens with a welcome reception on December 8th, followed by two days of main stage sessions, in-depth breakouts, and valuable networking opportunities, including one-on-one meetings with Aon representatives. Attendees can expect to engage with Aon's experts, discuss investment challenges and strategies, and access exclusive insights and market outlooks. The agenda will feature keynote speakers, panel discussions, and sessions</p> |

| 2025 Event Title — Organizer, Date, and Location                                                                                  | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                   | <p>covering global market trends, investment strategies, operational due diligence, private markets, and tailored content for various institutional investors. Specific session and speaker details will be announced closer to the event.</p> <p>— Asset Managers and Owners, Investment Service Providers</p>                                                                                                                                                                    |
| Website                                                                                                                           | <a href="#">Home - 2025 Wealth Insights Series - Miami</a>                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Contact                                                                                                                           | <a href="mailto:wealthinsightsseries@aon.com">wealthinsightsseries@aon.com</a>                                                                                                                                                                                                                                                                                                                                                                                                     |
| Fees                                                                                                                              | Free for Asset Owners                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Benefits Roundtable — California Association of Public Retirement Systems (CALAPRS)</b><br><b>12/11/2025</b><br><b>Virtual</b> | <p>The CALAPRS Benefits Roundtable brings together benefits professionals from California public retirement systems to discuss current issues in member benefits, such as health plans, disability, retirement, and compliance. Participants share best practices, collaborate on solutions, and network in an interactive setting, sometimes with guest speakers addressing specialized topics. Must register for agenda and more specific information.</p> <p>— Members Only</p> |
| Website                                                                                                                           | <a href="#">California Association of Public Retirement Systems</a>                                                                                                                                                                                                                                                                                                                                                                                                                |
| Contact                                                                                                                           | <a href="mailto:info@calaprs.org">info@calaprs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Fees                                                                                                                              | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                             |

## 2026 Events

| 2026 Event Title — Organizer, Date, and Location                                                                                                                                | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Annual Health Benefits Conference &amp; Expo (HBCE) — International Foundation of Employee Benefit Plans (IFEBP)</b><br><b>01/20-22/2026</b><br><b>Ponte Vedra Beach, FL</b> | <p>This conference will focus on innovative strategies and best practices for improving health, wellness, and financial resilience in the workplace. Sessions will address aligning care for high-risk, high-cost individuals, integrating wellness and performance programs, designing sustainable benefits plans, and leveraging healthcare survey insights. Attendees will learn how to create inclusive benefits for Gen Z, support employee caregivers, and use AI to prevent opioid addiction. The conference will also cover legal issues related to self-funded health plans, lessons from health plan litigation, and the business case for adopting food-as-medicine initiatives. Additional topics include wellness program incentives, addressing obesity's impact, building a culture of wellness, empowering HR through AI, and demonstrating the value of stability in managing employee crises.</p> <p>— Open to All</p> |
| Website:                                                                                                                                                                        | <a href="#">35th Annual Health Benefits Conference &amp; Expo (HBCE)</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Contact:                                                                                                                                                                        | <a href="#">Contact Us</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Fees:                                                                                                                                                                           | Pricing information on main website.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Legislative Conference — National Conference on Public Employee Retirement Systems (NCPERS)</b><br><b>1/26-28/2026</b><br><b>Washington, DC</b>                              | <p>The NCPERS Legislative Conference &amp; Policy Day offers public fund trustees and plan administrators a unique chance to advocate directly to Congress, the Administration, and federal agencies about public pension issues. On the first day, participants will engage with lawmakers, staff, and regulators to learn about upcoming legislative plans and pressing pension topics. The second day features scheduled congressional meetings, giving attendees the opportunity to influence public policy, build relationships, and strengthen their voice in Washington on behalf of the public pension community.</p> <p>— Open to All</p>                                                                                                                                                                                                                                                                                       |
| Website                                                                                                                                                                         | <a href="#">About the NCPERS Legislative Conference</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

| 2026 Event Title — Organizer, Date, and Location                                                                                                        |         | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|---------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                         | Contact | <a href="mailto:info@ncpers.org">info@ncpers.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                                                                                                                                         | Fees    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|                                                                                                                                                         |         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Private Equity: Investing and Creating Value — The Wharton School, University of Pennsylvania</b><br><b>02/01-06/2026</b><br><b>Philadelphia, PA</b> |         | <p>This Wharton program on private equity addresses both the sector's recent surge in funding and the challenges it now faces, such as overheated markets, due diligence difficulties—especially in emerging regions—federal scrutiny over fee disclosures, and potential business contraction. Combining lectures from Wharton finance faculty and alumni leaders, the program covers key topics like asset pricing, cash flow forecasting with country risk, and specialized issues in emerging and frontier markets. Participants can tailor their learning to areas of interest, engage in case studies and group presentations, and gain insights from current research and industry experts. The curriculum is designed to provide a comprehensive understanding of the private equity landscape, practical tools used by managers, and firsthand perspectives from experienced Wharton alumni.</p> <p>— Open to All</p> |
|                                                                                                                                                         | Website | <a href="#">Private Equity Program for Investing &amp; Creating Value - Wharton</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|                                                                                                                                                         | Contact | <a href="mailto:execed@wharton.upenn.edu">execed@wharton.upenn.edu</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|                                                                                                                                                         | Fees    | \$14,500                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|                                                                                                                                                         |         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Winter Meeting — National Association of State Retirement Administrators (NASRA)</b><br><b>2/28 – 3/02/2026</b><br><b>Washington, DC</b>             |         | <p>NASRA's Winter Meeting, held annually in Washington, D.C., gathers retirement system directors, senior staff, and policy leaders. The event starts with Sunday roundtable discussions and presentations tailored for system leadership to share insights and strategies. On Monday, the meeting expands to all NASRA members, featuring expert briefings on federal legislative and regulatory developments, forecasts for the coming year, and analysis of issues affecting public retirement systems nationwide.</p> <p>— Members Only</p>                                                                                                                                                                                                                                                                                                                                                                                |
|                                                                                                                                                         | Website | <a href="#">NASRA</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|                                                                                                                                                         | Contact | <a href="mailto:mary@nasra.org">mary@nasra.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|                                                                                                                                                         | Fees    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|                                                                                                                                                         |         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>General Assembly — California Association of Public Retirement Systems (CALAPRS)</b>                                                                 |         | <p>The CALAPRS General Assembly is an educational conference designed for retirement system trustees, senior staff, and annual sponsors of CALAPRS. Usually scheduled from Saturday to Tuesday in March, the event features sessions on current and</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

| 2026 Event Title — Organizer, Date, and Location                                                                     |         | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----------------------------------------------------------------------------------------------------------------------|---------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>03/08-11/2026</b><br><b>Carlsbad, CA</b>                                                                          |         | <p>important topics, along with opportunities for networking. The agenda is created by a planning committee appointed by the CALAPRS Board of Directors. More information to come this fall.</p> <p>— Open to All</p>                                                                                                                                                                                                                                                                                                                                                                |
|                                                                                                                      | Website | <a href="#">General Assembly - California Association of Public Retirement Systems</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                                                                                                                      | Contact | <a href="mailto:info@calaprs.org">info@calaprs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                                                                                                                      | Fees    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Spring Conference — Council of Institutional Investors (CII)</b><br><b>03/09-11/2026</b><br><b>Washington, DC</b> |         | <p>The CII Spring Conference brings together construction industry professionals for keynote presentations, workshops, panel discussions, and networking. Attendees learn about the latest research, technologies, and best practices, while engaging in professional development and strategic planning. The event also features exhibitor booths, awards, and opportunities for collaboration, making it a valuable forum for advancing industry knowledge and connections. More specific details will be available online as the conference approaches.</p> <p>— Members Only</p> |
|                                                                                                                      | Website | <a href="#">CII Spring 2026 Conference: Washington, DC</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                                                                                                                      | Contact | <a href="mailto:michael@cii.org">michael@cii.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                      | Fees    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>2026 Public Funds Roundtable — Institutional Investor</b><br><b>04/27-29/2026</b><br><b>Beverly Hills, CA</b>     |         | <p>The 2026 Public Funds Roundtable will bring together senior investment officials from public pension funds and government investors for peer-to-peer discussions. Although the specific agenda for 2026 has not been detailed, previous roundtables have addressed topics such as global macro trends, asset allocation, investment strategy, governance, risk management, ESG, and technology innovation.</p> <p>— Asset Owners and Limited Number of Consultants</p>                                                                                                            |
|                                                                                                                      | Website | <a href="#">Event - 2026 Public Funds Roundtable</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                      | Contact | <a href="mailto:luke.zammit@institutionalinvestor.com">luke.zammit@institutionalinvestor.com</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|                                                                                                                      | Fees    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Annual Symposium — Pension Research Council, The Wharton School</b>                                               |         | <p>The 2026 PRC Symposium, with a theme of "Public Debt and Retirement Security," will take place from April 30 to May 1, 2026. The event will focus on the rising level of public debt in the</p>                                                                                                                                                                                                                                                                                                                                                                                   |



| 2026 Event Title — Organizer, Date, and Location                                                                                               |         | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>04/30 – 5/01/2026</b><br><b>Philadelphia, PA</b>                                                                                            |         | <p>United States and its effects on retirement systems globally. Speakers and panelists will examine how increasing public debt could influence savings, investment, and withdrawal strategies for retirement plan sponsors, insurers, and households. They will also explore the origins of this debt, the risks it poses to financial stability, and its potential impact on retirement planning and future outcomes. Limited information available, more specific details will be available online as the conference approaches.</p> <p>— Members Only</p> |
|                                                                                                                                                | Website | <a href="#">All Conferences - Pension Research Council</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|                                                                                                                                                | Contact | <a href="mailto:prc@wharton.upenn.edu">prc@wharton.upenn.edu</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|                                                                                                                                                | Fees    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Spring Conference — State Association of County Retirement Systems (SACRS)</b><br><b>05/12-15/2026</b><br><b>Olympic Valley, CA</b>         |         | <p>The SACRS Spring Conference gathers professionals from California county retirement systems for keynote presentations, educational sessions, and panels on investments, governance, and legislative updates. The event features networking opportunities, an exhibitor hall, committee meetings, and professional development, keeping attendees informed about best practices and current issues in public pensions. More specific details will be available online as the conference approaches.</p> <p>— Open to All</p>                                |
|                                                                                                                                                | Website | <a href="#">SACRS &gt; Events &gt; Spring Conference</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|                                                                                                                                                | Contact | <a href="mailto:sacrs@sacrs.org">sacrs@sacrs.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|                                                                                                                                                | Fees    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Annual Conference — National Conference on Public Employees Retirement Systems (NCPERS)</b><br><b>05/17-20/2026</b><br><b>Las Vegas, NV</b> |         | <p>As the largest event hosted by NCPERS, the Annual Conference and Exhibition (ACE) delivers a unique experience with interactive sessions, workshops, and extensive networking opportunities. With expert speakers and up-to-date industry information, this conference is invaluable for trustees, administrators, government officials, and service providers looking to expand their expertise and professional relationships. More specific details will be available online as the conference approaches.</p> <p>— Members Only</p>                    |
|                                                                                                                                                | Website | <a href="#">NCPERS Annual Conference &amp; Exhibition</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|                                                                                                                                                | Contact | <a href="mailto:info@ncpers.org">info@ncpers.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

| 2026 Event Title — Organizer, Date, and Location                                                                                                                   |         | Overview and Audience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                                    | Fees    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                                                                                                                                                                    |         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Annual Conference — National Association of State Retirement Administrators (NASRA)</b><br><b>08/08-12/2026</b><br><b>Boston, MA</b>                            |         | <p>Exclusively for members, the conference offers a comprehensive agenda including general sessions, panel discussions, roundtables, and peer networking, all focused on public retirement system governance and operations. Attendees gain insights from nationally recognized experts on topics such as investment management, governance, economic trends, workforce issues, technology, cybersecurity, and legislative developments. The event also features interactive workshops for senior staff and CEOs, plus opportunities to explore innovative solutions from associate members and partners, making it a key forum for enhancing the management, sustainability, and security of U.S. public retirement systems.</p> <p>— Members Only</p>                                                                                                              |
|                                                                                                                                                                    | Website | <a href="#">NASRA</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|                                                                                                                                                                    | Contact | <a href="mailto:mary@nasra.org">mary@nasra.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|                                                                                                                                                                    | Fees    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                                                                                                                                                                    |         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Public Pension Funding Forum — National Conference on Public Employee Retirement Systems (NCPERS)</b><br><b>08/16-18/2026 (Tentative)</b><br><b>Chicago, IL</b> |         | <p>The Public Pension Funding Forum brings together trustees, administrators, policymakers, and experts to deepen understanding of trends and developments in public pension funding. Featuring presentations and debates by leading economists, including Nobel laureates, the event delivers objective analysis, research, and practical case studies on funding adequacy and reform initiatives. Attendees gain insights into the fiscal, political, and economic forces shaping pension systems, learn to distinguish rhetoric from fact, and explore solutions for sustainable funding. The Forum is designed for a wide range of stakeholders—including pension fund officials, legislators, the investment community, and researchers—and focuses on advancing educational programs and research to support the long-term health of public pension plans.</p> |
|                                                                                                                                                                    | Website | <a href="#">About NCPERS Public Pension Funding Forum</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|                                                                                                                                                                    | Contact | <a href="mailto:info@ncpers.org">info@ncpers.org</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                    | Fees    | Not available. Contact organizer for more information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                                                                                                                                                                    |         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## 2025-2026 Index

| Date                                        | Location            | 2025-2026 Event and Organizer                                                                                         |
|---------------------------------------------|---------------------|-----------------------------------------------------------------------------------------------------------------------|
| <b>2025</b>                                 |                     |                                                                                                                       |
| 09/18/2025                                  | Chicago, IL         | Influential Women in Institutional Investing (IWII) — Pensions & Investments                                          |
| 09/28/2025                                  | Pleasanton, CA      | Fall Conference — California Retired County Employees Association (CRCEA)                                             |
| 10/03/2025                                  | Virtual             | Trustees' Roundtable — California Association of Public Retirement Systems (CALAPRS)                                  |
| 10/08/2025                                  | Chicago, IL         | Consultants & Institutional Investors Roundtable – Fall — Institutional Investor                                      |
| 10/10/2025                                  | Virtual             | Information Technology Roundtable — California Association of Public Retirement Systems (CALAPRS)<br>10/10/2025       |
| 10/16/2025                                  | New York, NY        | 2025 CIO Influential Investors Forum and Industry Innovation Awards Dinner — Chief Investment Officer                 |
| 10/17/2025                                  | Virtual             | Compliance Roundtable — California Association of Public Retirement Systems (CALAPRS)                                 |
| 10/20/2025<br>Alternate Date:<br>04/20/2025 | Philadelphia, PA    | Investment Strategies and Portfolio Management — The Wharton School, University of Pennsylvania                       |
| 10/25/2025                                  | Fort Lauderdale, FL | Program for Advanced Trustee Studies (PATs) — National Conference on Public Employee Retirement Systems (NCPERS)      |
| 10/25/2025                                  | Fort Lauderdale, FL | Accredited Fiduciary (NAF) Program — National Conference on Public Employee Retirement Systems (NCPERS)               |
| 10/26/2025                                  | Fort Lauderdale, FL | Fall Conference — National Conference on Public Employee Retirement Systems (NCPERS)                                  |
| 11/05/2025                                  | Costa Mesa, CA      | Intermediate Course in Retirement Plan Administration — California Association of Public Retirement Systems (CALAPRS) |

| Date        | Location              | 2025-2026 Event and Organizer                                                                                     |
|-------------|-----------------------|-------------------------------------------------------------------------------------------------------------------|
| 11/08/2025  | Honolulu, HI          | Trustees Masters Program (TMP) — International Foundation of Employee Benefit Plans (IFEBP)                       |
| 11/09/2025  | Honolulu, HI          | Annual Employee Benefits Conference — International Foundation of Employee Benefit Plans (IFEBP)                  |
| 11/11/2025  | Huntington Beach, CA  | Fall Conference — State Association of County Retirement Systems (SACRS)                                          |
| 11/18/2025  | Austin, TX            | Private Credit Forum — Institutional Investor                                                                     |
| 11/19/2025  | Austin, TX            | Public Funds Conference — Pensions & Investments                                                                  |
| 11/20/2025  | Virtual               | Legal Support Roundtable — California Association of Public Retirement Systems (CALAPRS)                          |
| 11/20/2025  | New York, NY          | CII & NYU Corporate Governance Bootcamp — Council of Institutional Investors                                      |
| 11/21/2025  | Virtual               | Investments Roundtable — California Association of Public Retirement Systems (CALAPRS)                            |
| 12/03/2025  | Costa Mesa, CA        | Advanced Course in Retirement Plan Administration — California Association of Public Retirement Systems (CALAPRS) |
| 12/08/2025  | Miami, FL             | Wealth Insights Series - Miami — Aon                                                                              |
| 12/11/2025  | Virtual               | Benefits Roundtable — California Association of Public Retirement Systems (CALAPRS)                               |
| <b>2026</b> |                       |                                                                                                                   |
| 01/20/2026  | Ponte Vedra Beach, FL | Annual Health Benefits Conference & Expo (HBCE) — International Foundation of Employee Benefit Plans (IFEBP)      |
| 01/26/2026  | Washington, DC        | Legislative Conference — National Conference on Public Employee Retirement Systems (NCPERS)                       |
| 02/01/2026  | Philadelphia, PA      | Private Equity: Investing and Creating Value — The Wharton School, University of Pennsylvania                     |
| 02/28/2026  | Washington, DC        | Winter Meeting — National Association of State Retirement Administrators (NASRA)                                  |
| 03/08/2026  | Carlsbad, CA          | General Assembly — California Association of Public Retirement Systems (CALAPRS)                                  |
| 03/09/2026  | Washington, DC        | Spring Conference — Council of Institutional Investors (CII)                                                      |
| 04/27/2026  | Beverly Hills, CA     | 2026 Public Funds Roundtable — Institutional Investor                                                             |
| 04/30/2026  | Philadelphia, PA      | Annual Symposium — Pension Research Council, The Wharton School                                                   |
| 05/12/2026  | Olympic Valley, CA    | Spring Conference — State Association of County Retirement Systems (SACRS)                                        |



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| Date       | Location      | 2025-2026 Event and Organizer                                                                     |
|------------|---------------|---------------------------------------------------------------------------------------------------|
| 05/17/2026 | Las Vegas, NV | Annual Conference — National Conference on Public Employees Retirement Systems (NCPERS)           |
| 08/08/2026 | Boston, MA    | Annual Conference — National Association of State Retirement Administrators (NASRA)               |
| 08/16/2026 | Chicago, IL   | Public Pension Funding Forum — National Conference on Public Employee Retirement Systems (NCPERS) |

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## Disclaimer

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