



The Cortex Report

Customized for the

San José Retirement Boards

January 2022

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Introduction to The Cortex Report

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

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

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

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Jun 27, 2022	International Foundation of Employee Benefit Plans (IFEBP)	Public Employee Benefits Institute	Seattle, Washington	17	<i>New</i>
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Aug 06, 2022	National Association of State Retirement Administrators (NASRA)	Annual Conference	Long Beach, California	18	<i>New</i>
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Sep 23, 2022	International Foundation of Employee Benefit Plans (IFEBP)	Certificate Series - Investment Basics	Washington, District of	6	<i>New</i>
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Oct 23, 2022	International Foundation of Employee Benefit Plans (IFEBP)	Annual Employee Benefits Conference	Las Vegas, Nevada	21	<i>New</i>
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Event Listings

Seminar : Leadership Decision Making: Optimizing Organizational

Start Date: January 10, 2022

Organizer: Harvard Kennedy School

End Date: January 21, 2022

Location: On-line

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

Difficulty: Intermediate

Topic Area: Leadership

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

\$4,950

Application deadline:
December 20, 2021

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

Seminar : ICGN Governance, Stewardship & Sustainability Course

Start Date: January 19, 2022

Organizer: International Corporate Governance Network (ICGN)

End Date: February 02, 2022

Location: On-line

Alternative Date(s) & Location(s) May 4 - 18 2022, On-line

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

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

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

For more information, please visit the website.

Fees

£430 + 20% VAT - member
£645 + 20% VAT - non-member

Contact

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

Email

florence.doel@icgn.org

Link: <https://www.icgn.org/events/icgn-online-governance-stewardship-sustainability-course-jan-feb-2022>

Conference : 2022 Visions, Insights & Perspectives (VIP) Americas

Start Date: January 24, 2022

Organizer: Institutional Real Estate, Inc. (IREI)

End Date: January 26, 2022

Location: Carlsbad, California

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: By Invitation Only

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

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

Fees

Not available. Please contact conference organizer.

Contact

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

Email

l.jaramillo@irei.com

Link: <https://irei.com/events/2022-visions-insights-perspectives-vip-americas/>

Conference : Annual Health Benefits Conference & Expo

Start Date: January 31, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBC)

End Date: February 02, 2022

Location: Clearwater, Florida

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

Difficulty: General

Topic Area: Healthcare Management

Attendance: Open To All

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

For more information, visit the website.

Fees

Early Bird Rate: \$475
Corporate Rate: \$625

Check website for more options.

Contact

Tel: (888) 334-3327

Email

edreg@ifebc.org

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

Conference : Global Real Assets Investment Forum

Start Date: February 01, 2022

Organizer: Institutional Investor

End Date: February 02, 2022

Location: Austin, Texas

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

Difficulty: Intermediate

Topic Area: Investments

Attendance: By Invitation Only

The Change in the Future Trendline Is Real: Implications for Investors in the World of Real Assets

After a big shift in the markets, a question that many investors are raising is, do you really need real assets in your portfolio? There is indeed a need, but it is time to reevaluate the portfolios and your real assets investment objectives. With the changes in the global economy, investors' approach to real assets and different sectors have shifted, with infrastructure gaining attention and niche sectors top of mind for investors. Issues such as digitization, ESG and climate change are certainly leading the way.

Trends that once seemed to be a decade away, are hitting us now. What are the concerns and opportunities that investors are looking at now? Is the real assets market moving on the momentum of pre-existing trends or are the new opportunities and priorities replacing the market? Investors will explore and identify the sectors, strategies and geographies that will dominate the market in the future.

2022 is indeed a year for recovery but also a year of transition for investors to position their portfolios for the next market downturn!

Fees

No fee. Registration for this event is complimentary for qualified institutional investor.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iinow.com/Institutional-Investor-Forums/Global-Real-Assets-Forum-2022>

Conference : Advanced Trustees and Administrators Institute

Start Date: February 21, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBC)

End Date: February 23, 2022

Location: Orlando, Florida

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

More information about the conference is not yet available.

Fees

\$2,225 - non-member
\$1,895 - member

Please see the website for more options.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/TrusteesAdmin/Pages/advanced-trustees-and-administrators-institute-2202.aspx>

Conference : ESG Summit**Start Date:** February 22, 2022**Organizer:** Pension Bridge**End Date:** February 23, 2022**Location:** San Diego, California**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** ESG and ethical investing**Attendance:** Open To All

Over the past five years, the importance of ESG has grown exponentially within the investment industry across the globe, with Morningstar recently reporting growth in ESG focused funds for the fifth consecutive quarter, to over \$2.3 trillion in Q2 2021, and Bloomberg predicting that global ESG assets will exceed \$53 trillion by 2025. Whilst Europe leads the way, the US is expected to expand quickly within this sector, dominating it over the next months and years. Responsible investing is, however, not only limited to environmental issues. In the wake of 2020, the world experienced a seismic cultural shift that has never been seen before, culminating in an urgency for the improvement of racial and gender equality on a global basis. Prioritizing diversity, equity and inclusion in the workplace is now seen as paramount, with research proving that firms with diverse leadership teams consistently outperform those that don't. Join us in San Diego, as we bring together an audience of 300 investment professionals from North America's top institutional investors, investment consultants and asset managers, for insightful conversations and in-depth knowledge sharing, to gain tangible action points that can be implemented into your investments. See the website for more info.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 646 891 2152

Email

rinstance@pensionbridge.com

Link: <https://www.pensionbridge.com/esg>**Conference :** Winter Meeting**Start Date:** February 26, 2022**Organizer:** National Association of State Retirement Administrators (NASRA)**End Date:** February 28, 2022**Location:** Washington, District of Columbia**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Members Only

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

More information about the conference is not yet available.

Fees

Not yet available

Contact

Mary Hiatte
Tel: 202-624-1418

Email

mary@nasra.org

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

Seminar : Certificate Series - Retirement Plan Basics

Start Date: February 28, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: March 01, 2022

Location: San Diego, California

Alternative Date(s) & Location(s) Sep 19 - 20 2022, Washington, District of Columbia

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

Topics for this course include:

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

Fees

\$1,815 - non-member
\$1,595 - member
Early bird discount of \$300 if registered by Jan. 17, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/certificateseries/schedule/Pages/certificate-series-retirement-plan-basics-2262.aspx>

Seminar : Corporate Governance: Developing Exceptional Board Leaders

Start Date: March 01, 2022

Organizer: Columbia Business School

End Date: March 03, 2022

Location: New York, New York

Alternative Date(s) & Location(s) May 16 - 20 2022, On-line

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

The Corporate Governance Program equips executives and professionals who currently serve or are interested in serving on corporate boards with the knowledge required to excel as stewards of shareholders that promote long-term and sustainable value creation.

Drawing on thought leadership from world-renowned experts at Columbia Business School and leading practicing directors, this program integrates academic research with a deep understanding of the emerging issues that boardrooms face. The program devotes one day entirely to emerging issues in the field of corporate governance, such as CEO succession plans, shareholder activism, the disruptive impact of technology and cyber risk, and the topic of diversity and inclusion. Program participants interact with round tables of top US directors, moderated by a Columbia Business School faculty expert in an engaging format.

For more information, please visit the website.

Fees

\$7,350 (in-person)
\$6,550 (virtual)

Contact

Yoon Lee
Director, Learning Solutions
+1 212-854-3390

Email

yoon.lee@gsb.columbia.edu

Link: <https://www8.gsb.columbia.edu/execed/program-pages/details/2548/CGP#overview>

Conference : Responsible Investment Forum

Start Date: March 02, 2022

Organizer: Private Equity International

End Date: March 03, 2022

Location: New York, New York

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

Difficulty: Intermediate

Topic Area: ESG and ethical investing

Attendance: Members Only

The Responsible Investment Forum returns for its sixth year as a virtual event to bring together the most sophisticated institutional investors, fund managers, consultants and highly recognized associations to discuss why, when, and how your firm should be implementing an effective ESG strategy.

Potential Topics include: Delivering social and environmental impact in the healthcare sector; Good sustainability reporting; Responsible investing for real estate investors ESG in private debt; Sustainable infrastructure investing; Clean, renewable & sustainable energy; Emerging opportunities in impact investing; Environmental justice

See the website for more information about the conference.

Fees

For fund and asset managers, and developers.

Various Ticket Prices start from: \$3,145.00 USD

Contact

P: 212 645 1919

Email

regny@peimedia.com

Link: <https://www.peievents.com/en/event/responsible-investment-forum-new-york>

Seminar : Certificate Series - Investment Basics

Start Date: March 02, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: March 03, 2022

Location: San Diego, California

Alternative Date(s) & Location(s) Sep 23 - 24 2022, Washington, District of Columbia

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

Topics include:

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

Fees

\$1,815 - non-member
\$1,595 - members

Early bird discount of \$300 if registered by Jan. 17, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/certificate/schedule/Pages/certificate-series-investment-basics-2287.aspx>

Conference : General Assembly

Start Date: March 05, 2022

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 08, 2022

Location: On-line

Alternative Date(s) Mar 4 - 7 2023, Monterey, California

& Location(s) Mar 2 - 5 2024, Rancho Mirage, California

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

info@calaprs.org

Link: <https://www.calaprs.org/page/generalassembly>

Seminar : Mobilizing Your Nonprofit Board

Start Date: March 07, 2022

Organizer: Harvard Kennedy School

End Date: May 06, 2022

Location: On-line

Alternative Date(s) N/A

& Location(s)

Difficulty: General

Topic Area: Investments

Attendance: Open To All

This course will provide you with the practical skills and conceptual frameworks that will help you lead more engaged boards. This course explores methods for motivating board members, fostering a boardroom culture that promotes rich dialogue, engaging your board in the big questions facing your organization without inviting them to micromanage, and cultivating a board that is both consequential to the organization and rewarding for its members.

The program explores four key topics:

- Key concepts of governance as leadership
- Identifying and responding to practice challenges
- Simulation: case study of a difficult board situation
- The challenge for executive leaders

See the website for more information about the program.

Fees

\$3,100
Application deadline:
February 14, 2022

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

Link: <https://www.hks.harvard.edu/educational-programs/executive-education/mobilizing-your-nonprofit-board>

Conference : Spring Conference

Start Date: March 07, 2022

Organizer: Council of Institutional Investors

End Date: March 09, 2022

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Members Only

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

More information about the conference is not yet available.

Fees

No charge for members.
Please visit website for details.

Contact

Michael Miller
Phone: 202.822.0800

Email

michael@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=3/7/2022&eventid=109

Seminar : Private Equity: Investing and Creating Value

Start Date: March 14, 2022

Organizer: The Wharton School, University of Pennsylvania

End Date: March 18, 2022

Location: Philadelphia, Pennsylvania

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

\$11,280
Fees include accommodations and meals.

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

exced@wharton.upenn.edu

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

Conference : PREA Spring Conference

Start Date: March 23, 2022

Organizer: Pension Real Estate Association (PREA)

End Date: March 24, 2022

Location: Beverly Hills, California

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

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

Not yet available.

Contact

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

Email

amy@prea.org

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

Seminar : Advanced Principles of Pension Governance for Trustees

Start Date: March 30, 2022

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: April 01, 2022

Location: Los Angeles, California

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

Difficulty: General

Topic Area: Board Governance

Attendance: Members Only

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

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

register@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1449780&group=>

Seminar : Investment Strategies and Portfolio Management

Start Date: April 04, 2022

Organizer: The Wharton School, University of Pennsylvania

End Date: April 08, 2022

Location: On-line

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:

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

See the website for more information about the program.

Fees

\$8,500

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Seminar : Digital Transformation for Boards

Start Date: May 09, 2022

Organizer: Institute for Management Development (IMD) Business School

End Date: May 10, 2022

Location: On-line

**Alternative Date(s)
& Location(s)** Oct 7 - 8 2022, On-line

Difficulty: General

Topic Area: Board Governance

Attendance: Open To All

Digital Transformation for Boards brings you up-to-speed with the new digital landscape so you can make informed decisions and provide the best recommendations when evaluating digital opportunities and threats for your company.

You will develop a better understanding of the competencies and behaviors required to successfully lead in an environment characterized by digital disruption.

This course will help you:

- Grasp the potential impact of digital technologies on your company's performance
- Understand the new competitive dynamics disrupting your industry
- Identify the competencies and behaviors needed to lead successfully in a digital age
- Be prepared to advise and support your management on digital transformation

Note: This event is a hybrid format (may attend in-person in Lausanne, Switzerland or virtually).

Fees

CHF 6,600

Contact

Michael Wade, Program
Director
Phone: +41 (0)21 618 0111

Email

michael.wade@imd.org

Link: <https://www.imd.org/dtb/digital-transformation-for-board-members/>

Conference : Spring Conference

Start Date: May 10, 2022

Organizer: State Association of County Retirement Systems (SACRS)

End Date: May 13, 2022

Location: San Diego, California

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

See the website for more information about the conference.

Fees

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

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : Redefining Fixed Income Forum

Start Date: May 10, 2022

Organizer: Institutional Investor

End Date: May 11, 2022

Location: Chicago, Illinois

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

Difficulty: General

Topic Area: Investments

Attendance: By Invitation Only

Allocators' concerns on inflation, interest rates, duration, and yield have all remained top of mind. As fixed income is looking to rebound, investors seem to be looking more closely than ever at private debt market. And their funds seem to be following. Will this lead to an environment of fixed income private markets strategies versus fixed income public markets strategies as opposed to private markets AND public markets? Only time can tell. (With a lot of pundits opining in the meantime.)

But with an increasing interest in niche fixed income sectors, are investors looking at new or existing manager? It is also time to discuss the incorporation of ESG in fixed income portfolio and how investors due diligence process has evolved.

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

Fees

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

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iinow.com/Institutional-Investor-Forums/8th-Annual-Redefining-Fixed-Income-Forum>

Seminar : Strategy Governance for Boards		Start Date: May 13, 2022
Organizer: Institute for Management Development (IMD) Business School		End Date: May 14, 2022
Location: On-line	Alternative Date(s) & Location(s)	Nov 21 - 22 2022, On-line
Difficulty: General		
Topic Area: Board Governance		Attendance: Open To All
<p>This event will enable you to play a meaningful, advisory role in the governance of your firm's corporate strategy within the context of an increasingly digital landscape.</p> <p>Specifically the program will help participants:</p> <ul style="list-style-type: none"> • Understand the role of boards in strategy formulation and validation • Ensure that board governance mechanisms are connected to their firm's strategy • Monitor their firm's strategy effectively within the context of a 'digital' age • Strike the right balance between growing today's business and investing in emerging opportunities <p>See the website for more information about the program.</p>		<p>Fees</p> <p>CHF 6,600</p> <p>Contact</p> <p>Didier Cossin, Program Director Phone: +41 (0)21 618 0111</p> <p>Email</p> <p>didier.cossin@imd.org</p>
Link: https://www.imd.org/sgb/strategy-governance-board-training/		

Conference : Trustee Education Seminar		Start Date: May 21, 2022
Organizer: National Conference on Public Employee Retirement Systems		End Date: May 22, 2022
Location: Washington, District of Columbia	Alternative Date(s) & Location(s)	N/A
Difficulty: General		
Topic Area: Board Governance		Attendance: Members Only
<p>This seminar is held in conjunction with the Annual Conference and Exhibition. It is intended for new and novice trustees who are seeking a better understanding of their role and responsibilities as trustee of their pension fund. It also serves as a refresher for experienced trustees interested in staying up-to-date.</p> <p>The program is designed with a clear focus on the educational needs of trustees who are relatively new to a pension plan board. The focus is on investing principles, board policies, and fundamental concepts that every trustee should know.</p> <p>The second day of TEDS features the Asset Allocation Challenge, an interactive computer-based investment training exercise. Members are placed in groups and asked to select assets based on the given economic environment presented to them. This program is ideal for new trustees and can be repeated.</p> <p>TEDS attendees can earn up to eight (9.5) hours of continuing education credits.</p>		<p>Fees</p> <p>Not yet available.</p> <p>Contact</p> <p>Alyssa Carlson Phone: 202-624-1456 Fax: 202-624-1439</p> <p>Email</p> <p>registration@ncpers.org</p>
Link: http://www.ncpers.org/teds		

Conference : Accredited Fiduciary (NAF) Program

Start Date: May 21, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 22, 2022

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

Module 1 – Governance and the Board's Role

Module 2 – Investment and Finance

Module 3 – Legal, Risk Management and Communication

Module 4 – Human Capital

See the website for more information about the program.

Fees

Not yet available

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

Early bird discount of \$200

Contact

Alyssa Carlson

Phone: 202-624-1456

Fax: 202-624-1439

Email

registration@ncpers.org

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

Conference : Annual Conference and Exhibition

Start Date: May 22, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 25, 2022

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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For more information, please visit the website.

Fees

Not yet available.

Contact

Alyssa Carlson

Phone: 202-624-1456

Fax: 202-624-1439

Email

registration@ncpers.org

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

Conference : Washington Legislative Update

Start Date: May 23, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: May 24, 2022

Location: On-line

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

Difficulty: General

Topic Area: Legislation

Attendance: Open To All

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

Fees

\$1,800 - non-members
\$1,580 - members

Early bird discount of \$300 if registered by Apr. 5, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/virtual-conferences/Pages/washington-legislative-updated-virtual-conference.aspx>

Conference : Virtual Conference

Start Date: June 05, 2022

Organizer: Government Finance Officers Association (GFOA)

End Date: June 08, 2022

Location: On-line

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

Difficulty: General

Topic Area: General

Attendance: Open To All

GFOA's Annual Conference. Join this event to hear from leading practitioners, recognized industry experts, researchers, and your peers how to effectively prioritize the current needs of your community and prepare for any future challenges.

Please check website for updates.

Fees

Members - \$420
Non-members - \$575

Contact

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

Email

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

Conference : Annual Conference

Start Date: June 05, 2022

Organizer: Government Finance Officers Association (GFOA)

End Date: June 08, 2022

Location: Austin, Texas

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

Difficulty: General

Topic Area: General

Attendance: Open To All

GFOA's 116th Annual Conference. Full details are not available yet.

Please check website for updates.

Fees

Not available. Please contact conference organizer.

Contact

Tel:(312) 977-9700

Fax:(312) 977-4806

Email

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

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

Start Date: June 06, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBCP)

End Date: June 07, 2022

Location: Santa Monica, California

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

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

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

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

Fees

\$1,745 - non-member

\$1,525 - member

Early bird discount of \$300 if registered by Apr. 25, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/cappp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-cappp-pension-part-i-22a1.aspx>

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

Start Date: June 08, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: June 09, 2022

Location: Santa Monica, California

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

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

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

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

Fees

\$1,745 - non-member
\$1,525 - member
Early bird discount of \$300 if registered by Apr. 25, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/cappp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-cappp-pension-part-ii-22a2.aspx>

Seminar : Board and Risk for Boards

Start Date: June 13, 2022

Organizer: Institute for Management Development (IMD) Business School

End Date: June 14, 2022

Location: On-line

Alternative Date(s) & Location(s) Jun 13 - 14 2022, Lausanne, Switzerland
Nov 23 - 24 2022, On-line

Difficulty: General

Nov 23 - 24 2022, Lausanne, Switzerland

Topic Area: Risk Management

Attendance: Open To All

Risk awareness and supervision are among the central duties of an effective board yet despite this important risk mission, many boards do not have a systematic risk approach.

This program is an opportunity for board members to develop this approach and to upgrade to best-in-class risk work while differentiating it from executive risk thinking.

This course will help you:

- Identify and assess your organization's risks
- Analyze how strategic risk can be assessed and managed
- Gain techniques for setting risk appetite
- Access the risk behaviors of the board and management

Note: This event is a hybrid format (may attend in-person in Lausanne, Switzerland or virtually).

Fees

CHF 6,600

Contact

Didier Cossin, Program Director
Phone: +41 (0)21 618 0111

Email

didier.cossin@imd.org

Link: <https://www.imd.org/brb/risk-for-board-members/>

Conference : Annual Conference

Start Date: June 20, 2022

Organizer: International Corporate Governance Network (ICGN)

End Date: June 22, 2022

Location: Toronto, Ontario, Canada

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

This conference will be hosted by the Ontario Teachers Pension Plan.

Over 500 influential governance professionals will convene in Toronto to discuss developments in corporate governance from an international perspective. As the governance and investor stewardship landscape continues to evolve, our leading expert speakers will provide attendees with key insights into best practice and highlight future priorities for companies, investors and stakeholders.

Please check the website for more information.

Fees

Not available.

Contact

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

Email

florence.doel@icgn.org

Link: <https://www.icgn.org/events/icgn-2022-annual-conference-toronto>

Conference : Public Employee Benefits Institute

Start Date: June 27, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: June 29, 2022

Location: Seattle, Washington

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

Difficulty: General

Topic Area: Board Governance

Attendance: Open To All

The public sector has faced unique challenges in recent years with budget cuts and media attention on benefit plans. The Public Employee Benefits Institute is dedicated to addressing the benefits topics most critical to public plans. Gather in an intimate environment to hear best practices, discuss issues and share ideas with peers who work with public sector benefit plans.

More information about the conference is not yet available.

Fees

\$2,225 - non-member
\$1,895 - member
Early bird discount of \$300 if registered by May 16, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/TrusteesAdmin/Pages/public-sector-benefits-institute-2209pe.aspx>

Seminar : Public Pension Investment Management Program**Start Date:** July 17, 2022**Organizer:** State Association of County Retirement Systems (SACRS)**End Date:** July 20, 2022**Location:** Berkeley, California**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** Investments**Attendance:** Open To All

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

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

See the website for more information about the program.

Fees

Not yet available.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

Link: <https://sacrs.org/Events/SACRS-UC-Berkeley-Program>**Conference : Annual Conference****Start Date:** August 06, 2022**Organizer:** National Association of State Retirement Administrators (NASRA)**End Date:** August 10, 2022**Location:** Long Beach, California**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Members Only

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

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

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

Fees

Not yet available

Contact

Mary Hiatte

Phone: 202.624.1418

Email

mary@nasra.org

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

Conference : Public Pension Funding Forum

Start Date: August 21, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: August 23, 2022

Location: Los Angeles, California

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

Difficulty: General

Topic Area: Pension Plan Policy

Attendance: Open To All

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

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

More information about the conference is not yet available.

Fees

Not yet available.

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

Contact

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

Email

registration@ncpers.org

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

Conference : PRI in Person

Start Date: September 20, 2022

Organizer: Principles for Responsible Investment (PRI)

End Date: September 22, 2022

Location: On-line

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

Difficulty: Intermediate

Topic Area: ESG and ethical investing

Attendance: Open To All

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

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

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

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

Email

jo.wackrill@unpri.org

Link: <https://www.unpri.org/all-events-and-webinars/pri-in-person-and-online/8221.article>

Conference : Annual Institutional Investor Real Estate Conference

Start Date: October 19, 2022

Organizer: Pension Real Estate Association (PREA)

End Date: October 21, 2022

Location: Washington, District of Columbia

Alternative Date(s) & Location(s) Oct 18 - 20 2023, Boston, Massachusetts

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

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

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

More information about the conference is not yet available.

Fees

Not yet available.

Contact

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

Email

amy@prea.org

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

Conference : Trustees Masters Program

Start Date: October 22, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: October 23, 2022

Location: Las Vegas, Nevada

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

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

For more information, please visit the website.

Fees

\$2,115 - non-member
\$1,895 - member

Early bird discount of \$300 if registered by Sept. 12, 2022

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/tmp/Pages/trustees-masters-program-tmp-22d2.aspx>

Conference : Public Safety Conference

Start Date: October 23, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 26, 2022

Location: Nashville, Tennessee

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

More information about the conference is not yet available.

Fees

Not yet available.
Previous years has been:
\$715

Contact

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

Email

registration@ncpers.org

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

Conference : Annual Employee Benefits Conference

Start Date: October 23, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBCP)

End Date: October 26, 2022

Location: Las Vegas, Nevada

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

Difficulty: General

Topic Area: General

Attendance: Members Only

The 68th Annual Employee Benefits Conference is the largest gathering of multiemployer and public employee benefit plan representatives. This event offers you the opportunity to network with your peers, be surrounded by industry experts and learn the latest in the industry so you can make the most informed decisions on behalf of your funds.

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

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

Fees

MEMBERS ONLY

Member: \$1,995 USD
Early bird discount of \$300 if
registered by Sept. 12, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/usannual/Pages/annual-employee-benefits-conference-2201.aspx>

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

Cortex Applied Research Inc.
PO Box 15578 Royal York Bloor PO
Etobicoke, ON M8X 0A4
Tel: (416) 967-0252 Fax: (416) 967-2711
e-mail: info@cortexconsulting.com