



The Cortex Report

Customized for the

San José Retirement Boards

September 2022

FCERS 9-15-22

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Research, Inc., 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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Event Listings

Conference : Investment Conference

Start Date: September 07, 2022

Organizer: BCA Research

End Date: September 08, 2022

Location: New York, New York

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

BCA is an independent provider of global investment research. Since 1949, its mission has been to support its clients in making better investment decisions through the delivery of leading-edge analysis and forecasts of all the major asset classes and economies, as well as educating, informing and stimulating discussion through clear and thought-provoking research.

The 43rd Annual Global Investment Conference will take place on September 7-8, 2022 at the Plaza Hotel in New York City. This conference will be an in-person event which will enable participants to meet with BCA Research's Chief Strategists.

Under the theme "The New Paradigm for Macro and Markets," the conference will give you direct access to leaders from the worlds of finance, economics and geopolitics, to address current and forward-looking questions facing the global investment industry. If you are attending in person, you will have ample opportunities to engage with our Chief Strategists, conference speakers and industry peers.

Fees

\$3,299

Early bird discount of \$300 if booked before Aug. 8, 2022

Contact

Phone: +1 514 499 9706

Toll-free: 1 800 724 2942

Email

support@bcaaresearch.com

Link: <https://info.bcaaresearch.com/bca-annual-investment-conference-0>

Seminar : Private Equity: Investing and Creating Value

Start Date: September 12, 2022

Organizer: The Wharton School, University of Pennsylvania

End Date: September 16, 2022

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Mar 13 - 17 2023, Philadelphia, Pennsylvania

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

\$13,650

Fees include accommodations and meals.

Contact

Phone: 215.898.1776

Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Seminar : ICGN Governance, Stewardship & Sustainability Course**Start Date:** September 14, 2022**Organizer:** International Corporate Governance Network (ICGN)**End Date:** September 28, 2022**Location:** On-line**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** ESG and ethical investing**Attendance:** Open To All

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

The course will be delivered in three approximately 2.5 sessions over the course of 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/education/icgn-governance-stewardship-sustainability-course-september-2022>

Seminar : Pension Governance Education Program**Start Date:** September 19, 2022**Organizer:** International Centre for Pension Management (ICPM)**End Date:** September 22, 2022**Location:** Toronto, Ontario, Canada**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** Board Governance**Attendance:** Open To All

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

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

See the website for more information about the program.

Fees

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

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

Contact

Phone: 416.925.4153
Fax: 416.925.7377

Email

icpm@icpmnetwork.com

Link: <https://icpmnetwork.com/site/events/pension-board-education>

Conference : PRI Academic Week

Start Date: September 19, 2022

Organizer: Principles for Responsible Investment (PRI)

End Date: September 23, 2022

Location: On-line

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

The event brings together the latest research and insights on responsible investment practices in an accessible way and aims to bridge the gap between academic researchers in sustainability and investors leading the way in RI.

The findings from peer-reviewed research are presented by their authors and discussed by investment practitioners and academics. It offers a unique opportunity for academics and investors to engage with each other, learn and discuss the latest insights.

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

Fees

€125 + 20% VAT

Contact

Meegan Marais

Phone: +44 (0)20 3714 3141

Email

events@unpri.org

Link: <https://www.unpri.org/research/call-for-papers-for-pri-academic-network-conference-2022/9700.article>

Conference : PRI Academic Network Conference

Start Date: September 19, 2022

Organizer: Principles for Responsible Investment (PRI)

End Date: September 23, 2022

Location: On-line

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

The PRI Academic Network is a vibrant and flourishing international community of over 11,000 academics and investment practitioners on ESG and investment. Academics are from RI-related disciplines, spanning accounting, economics, finance, law, management, sociology, and other subjects in the social and natural sciences.

The conference focuses on the latest research on responsible investment practices and as such it serves as an opportunity for academics and investors to engage with each other, learn and discuss the latest insights, and to network.

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

Fees

Not available. Please contact conference organizer.

Contact

Email

events@unpri.org

Link: <https://www.unpri.org/all-events-and-webinars/pri-academic-network-week-2022/10089.article>

Seminar: Certificate Series - Retirement Plan Basics

Start Date: September 19, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: September 20, 2022

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

Topics for this course include:

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

Fees

\$1,815 - non-member
\$1,595 - member
Early bird discount of \$300 if registered by Aug. 8, 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-2257.aspx>

Conference: Fall Conference

Start Date: September 21, 2022

Organizer: Council of Institutional Investors

End Date: September 23, 2022

Location: Boston, Massachusetts

Alternative Date(s) & Location(s) Sep 11 - 13 2023, Long Beach, California

Difficulty: General

Topic Area: Corporate Governance

Attendance: Members Only

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

See website for agenda.

Fees

No charge for members.
Please visit website for details.

Contact

Kylund Arnold
Phone: 202.822.0800

Email

kylund@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=9/20/2022&eventid=110

Seminar : Certificate Series - Investment Basics

Start Date: September 23, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: September 24, 2022

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

Topics include:

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

Fees

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

Early bird discount of \$300 if registered by Aug. 8, 2022.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/certificate-series/schedule/Pages/certificate-series-investment-basics-2273.aspx>

Conference : Delivering Alpha

Start Date: September 28, 2022

Organizer: Institutional Investor

End Date: September 28, 2022

Location: New York, New York

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

Difficulty: Intermediate

Topic Area: Investments

Attendance: By Invitation Only

This conference brings together the biggest names in the investment community from top institutional and sovereign funds, private equity, hedge funds and venture capital, as well as influential political and economic leaders. CNBC anchors and reporters will lead high-level discussions on the critical issues facing investors in today's global economy through virtual one-on-one interviews and panel sessions.

See the website for more information about the conference.

Fees

\$5,000 USD
Early bird discount of \$1,000

Contact

Email

events@cnbc.com

Link: <https://www.cnbcevents.com/delivering-alpha/>

Seminar : Leadership Decision Making: Optimizing Organizational	Start Date: October 03, 2022
Organizer: Harvard Kennedy School	End Date: October 14, 2022
Location: On-line	Alternative Date(s) & Location(s) Jan 9 - 20 2023, On-line
Difficulty: Intermediate	

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

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

See the website for more information about the program.

Fees

\$6,200

Application deadline:
Sept. 12, 2022

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

Conference : Institutional Investor Forum	Start Date: October 04, 2022
Organizer: Sovereign Wealth Fund Institute	End Date: October 05, 2022
Location: New York, New York	Alternative Date(s) & Location(s) N/A
Difficulty: General	

Topic Area: Investments	Attendance: Open To All
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Institute Fund Summit 2022 America, October 4-5, 2022, New York

The Sovereign Wealth Fund Institute (SWFI) is a global organization designed to study sovereign wealth funds, pensions, endowments, central banks and other long-term public investors in the areas of investing, asset allocation, risk, governance, economics, policy, trade and other relevant issues. This Forum is intended to be an information-driven, marketing-free forum exclusively for institutional investors to share insights. Discussions and presentations are purely educational.

Please see the website for more information.

Fees

No charge for institutional investors (sovereign wealth funds, public pension funds, permanent funds, central banks, etc.)

Contact

Phone: +1 1 (949) 228-4341

Email

events@swfinstitute.org

Link: <https://www.ifsummit.com/>

Conference : Global Roundtable 2022

Start Date: October 10, 2022

Organizer: Responsible Investor

End Date: October 14, 2022

Location: On-line

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

NEP FI's Global Roundtable consistently serves as a pivotal event in finance industry action, providing attendees an opportunity to collaborate with peers, demonstrate leadership, and learn from global financial leaders; the event in 2020 convened over 4500 finance professionals, corporates, policymakers, scientists, and civil society representatives. This years Global Roundtable, held in partnership with Climate Action, will provide a platform for systemic impact and address critical emerging topics, including portfolio alignment, adaptation, impact management and connectivity between the finance sector and the real economy.

Please see the website for more information about the conference.

Fees

No charge.

Contact

Email

grt@unepfi.org

Link: <https://www.unepfi.org/events/unep-fi-global-roundtable-2022/>

Seminar : Investment Strategies and Portfolio Management

Start Date: October 10, 2022

Organizer: The Wharton School, University of Pennsylvania

End Date: October 14, 2022

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Apr 17 - 21 2023, Philadelphia, Pennsylvania

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:

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

See the website for more information about the program.

Fees

\$11,850

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference : Discussion Forum

Start Date: October 16, 2022

Organizer: International Centre for Pension Management (ICPM)

End Date: October 18, 2022

Location: Toronto, Ontario, Canada

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

Difficulty: Advanced

Topic Area: General

Attendance: By Invitation Only

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

Please visit the website for details.

Fees

\$6,575 CAD
Must register before May 19, 2022

Contact

Phone: 416.925.4153
Fax: 416.925.7377

Email

icpm@icpmnetwork.com

Link: <https://icpmnetwork.com/company/roster/companyRosterDetails.html?companyId=20199&companyRosterId=97>

Conference : Fall Conference

Start Date: October 17, 2022

Organizer: Journal of Investment Management

End Date: October 18, 2022

Location: On-line

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

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

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

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

Fees

Not available. Please contact conference organizer.

Contact

Phone: (925) 299-7800
Fax: (925) 299-7815

Email

customerservice@joim.com

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

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
Oct 23 - 25 2024, Washington, District of Columbia
Oct 22 - 24 2025, Washington, District of Columbia

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

\$3,995 Non-Member

Please see the website for more options

Contact

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

Email

amy@prea.org

Link: <https://www.prea.org/fall2022/>

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

Start Date: October 22, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBCP)

End Date: October 23, 2022

Location: Las Vegas, Nevada

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-2218.aspx>

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 : Accredited Fiduciary (NAF) Program

Start Date: October 22, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 23, 2022

Location: Nashville, Kentucky

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 : 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.

Please see the website for more information.

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 (IFEBP)

End Date: October 26, 2022

Location: Las Vegas, Nevada

Alternative Date(s) & Location(s) Oct 23 - 26 2022, On-line

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>

Conference : Sustainable Returns: ESG Investing

Start Date: October 25, 2022

Organizer: Institutional Investor

End Date: October 26, 2022

Location: New York, New York

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: By Invitation Only

The rise of ESG investing in allocators' portfolios continues to outpace that of most other active strategies. And institutional investors are not the only ones taking notice. Underlying plan participants and stakeholders are demanding more transparency and accountability around investments. That trend is only predicted to increase as the coming decades will see millennials projected to control \$30 trillion of investable assets. This one-day summit will allow investors to explore environmental, social and governance investing from various viewpoints.

Please visit the website for details.

Fees

No fee. Limited to "qualified" institutional investors.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iinow.com/Institutional-Investor-ESG-Forum-2022>

Seminar : Investment Decisions and Behavioral Finance

Start Date: October 26, 2022

Organizer: Harvard Kennedy School

End Date: October 28, 2022

Location: Cambridge, Massachusetts

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

The course will enable you to:

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

See the website for more information about the program.

Fees

\$5,400
Includes tuition, materials and most meals, but not housing.
Application deadline: September 28, 2022.

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

Conference : Trustees' Roundtable

Start Date: October 28, 2022

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: October 28, 2022

Location: On-line

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

register@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1588237&group=>

Conference : Fall Conference

Start Date: November 08, 2022

Organizer: State Association of County Retirement Systems (SACRS)

End Date: November 11, 2022

Location: Los Angeles, California

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

See the website for more information about the conference.

Fees

Not yet available.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : Fixed Income & Credit

Start Date: November 15, 2022

Organizer: Pensions & Investments

End Date: November 15, 2022

Location: Chicago, Illinois

Alternative Date(s) Nov 17 2022, New York, New York

& Location(s) Nov 29 2022, On-line

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

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

Email

eglick@pionline.com

Link: <https://web.cvent.com/event/d0f2326b-3682-4e3b-a9b4-af9b6f983b21/summary?RefId=2022FICPISite>

Seminar : CII & NYU Corporate Governance Bootcamp

Start Date: November 16, 2022

Organizer: Council of Institutional Investors

End Date: November 18, 2022

Location: New York, New York

Alternative Date(s) N/A

& Location(s)

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

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

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

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

Fees

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

Contact

Connor Garvey
(202) 822-0800

Email

connor@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=11/16/2022&eventid=161

Seminar: Audit Committees in a New Era of Governance

Start Date: November 16, 2022

Organizer: Harvard Business School

End Date: November 18, 2022

Location: Boston, Massachusetts

Alternative Date(s) & Location(s) Jul 19 - 21 2023, Boston, Massachusetts

Difficulty: General

Topic Area: Board Governance

Attendance: Open To All

This program explores the best practices that your audit committee can use to fulfill its mandate and increase its strategic contribution. You will acquire the frameworks to align corporate strategy with financial reporting—and help your company operate more effectively in today's rigorous market and regulatory environment. The program prepares you to manage the creative tension between the compliance and strategic roles of the audit committee. While improving your ability to ensure compliance, transparency, and accountability, you will learn how to move your company beyond a compliance mentality toward strategic financial reporting and effective risk management.

See the website for more information about the program.

Fees

\$6,800
Covers tuition, books, accommodation & most meals

Contact

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

Email

executive_education@hbs.edu

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

Conference: PRI in Person

Start Date: November 30, 2022

Organizer: Principles for Responsible Investment (PRI)

End Date: December 02, 2022

Location: On-line

Alternative Date(s) & Location(s) Nov 30 - Dec 2 2022, Barcelona, Spain

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://pip2022.unpri.org/pip/>

Conference : Global Stewardship Forum

Start Date: December 01, 2022

Organizer: International Corporate Governance Network (ICGN)

End Date: December 01, 2022

Location: On-line

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

Stewardship is a shared responsibility for companies and investors alike in their pursuit to preserve and enhance the long-term value of companies. ICGN's first statement on investor stewardship, published in 2003, extends stewardship responsibilities beyond the activities of monitoring, voting and engagement to address the internal governance arrangements of investor themselves. Today stewardship concepts are enshrined in national codes around the world and in regional regulation, most notably the EU Shareholder Rights Directive. This Forum will address the how these codes and rules are being implemented in practice, what 'best in class' looks like and how to enhance the quality of stewardship disclosures.

See the website for more information about the conference.

Fees

£450 - non-member
£350 - member
Inclusive of 20% VAT

Contact

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

Email

florence.doel@icgn.org

Link: <https://www.icgn.org/icgn-2022-governance-stewardship-awards-forum>

Conference : 2023 Visions, Insights & Perspectives (VIP) Americas

Start Date: January 17, 2023

Organizer: Institutional Real Estate, Inc. (IREI)

End Date: January 19, 2023

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/2023-visions-insights-perspectives-vip-americas/>

Conference : Legislative Conference

Start Date: January 22, 2023

Organizer: National Conference on Public Employee Retirement Systems

End Date: January 24, 2023

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: Legislation

Attendance: Members Only

This is a conference for public fund trustees and plan administrators, highlighting the issues on Capitol Hill and in federal regulatory agencies that affect pension funds today. Past conferences have brought senior administration officials, Members of Congress and Washington insiders to help educate fund members on the critical issues affecting public pensions and equip them with the tools needed to deal with these issues effectively and meet-face-to-face with their elected leaders on the Hill.

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

Fees

Not yet available

Contact

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

Email

registration@ncpers.org

Link: <http://www.ncpers.org/legislative>

Conference : Annual Health Benefits Conference & Expo

Start Date: January 31, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBC)

End Date: February 01, 2023

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@ifebp.org

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

Conference : General Assembly

Start Date: March 04, 2023

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 07, 2023

Location: Monterey, California

Alternative Date(s) & 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/events/EventDetails.aspx?id=1449781&group=>

Conference : Spring Conference

Start Date: March 06, 2023

Organizer: Council of Institutional Investors

End Date: March 08, 2023

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.

See website for agenda.

Fees

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

Contact

Kylund Arnold
Phone: 202.822.0800

Email

kylund@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=3/6/2023&eventid=120

Conference : PREA Spring Conference**Start Date:** March 22, 2023**Organizer:** Pension Real Estate Association (PREA)**End Date:** March 23, 2023**Location:** Seattle, Washington**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/>**Conference :** Spring Conference**Start Date:** May 09, 2023**Organizer:** State Association of County Retirement Systems (SACRS)**End Date:** May 12, 2023**Location:** San Diego, California**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** General**Attendance:** Open To All

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

See the website for more information about the conference.

Fees

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

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference : Advanced Trustees and Administrators Institute

Start Date: June 19, 2023

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: June 21, 2023

Location: San Diego, California

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

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-2309.aspx>

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