Aon Consulting, Inc.

2026 – 2H* Upcoming Educational Conferences

City of San Jose Retirement Boards

* The time horizon has been extended to 2H26 to capture all remaining events in August

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2026 Events

2026 Event Title — Organizer, Date, and Location	Overview and Audience
Annual Conference — National Association of State Retirement Administrators (NASRA) **08/08-12/2026** **Boston, MA**	Exclusively for members, the conference offers a comprehensive agenda including general sessions, panel discussions, roundtables, and peer networking, all focused on public retirement system governance and operations. Attendees gain insights from nationally recognized experts on topics such as investment management, governance, economic trends, workforce issues, technology, cybersecurity, and legislative developments. The event also features interactive workshops for senior staff and CEOs, plus opportunities to explore innovative solutions from associate members and partners, making it a key forum for enhancing the management, sustainability, and security of U.S. public retirement systems. *Members Only*
Website	NASRA
Contact	mary@nasra.org
Fees	Not available. Contact organizer for more information.
Public Pension Funding Forum — National Conference on Public Employee Retirement Systems (NCPERS) **08/17-19/2026** **Chicago, IL**	The Public Pension Funding Forum brings together trustees, administrators, policymakers, and experts to deepen understanding of trends and developments in public pension funding. Featuring presentations and debates by leading economists, including Nobel laureates, the event delivers objective analysis, research, and practical case studies on funding adequacy and reform initiatives. Attendees gain insights into the fiscal, political, and economic forces shaping pension systems, learn to distinguish rhetoric from fact, and explore solutions for sustainable funding. The Forum is designed for a wide range of stakeholders—including pension fund officials, legislators, the investment community, and researchers—and focuses on advancing educational programs and research to support the long-term health of public pension plans.
Website	About NCPERS Public Pension Funding Forum
Contact	info@ncpers.org

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Fees	Not available. Contact organizer for more information.
CIO Lab: Cincinnati – Institutional Investor **09/09-10/2026** **Cincinnati, OH**	The CIO Lab, part of Institutional Investor's Endowments & Foundations Institute, is an invitation-only, highly interactive forum launching in 2025 for leading investment executives across endowments, foundations, pensions, healthcare, insurers, and family offices. In a collaborative, lab-style setting, participants prototype and stress-test investment strategies, share best practices, and tackle real portfolio challenges—gaining practical insights to strengthen long-term stewardship and outcomes for their institutions. *Invitation Only*
Website	CIO Lab: Cincinnati
Contact	giana.mortellite@institutionalinvestor.com, teresa.sanacore@institutionalinvestor.com
Fees	Not available. Contact organizer for more information.
Annual Retirement Plan Advisor Summit – Institutional Investor **09/29-30/2026** **Santa Monica, CA**	The Retirement Plan Advisor Institute (RPAI) is an invitation-only community that brings together leading retirement plan advisors, asset managers, and service providers for focused, peer-driven dialogue on the defined contribution market. Its meetings are designed to facilitate candid, collaborative discussions in a confidential setting, with agendas shaped by experienced practitioners and centered on the most pressing challenges facing retirement plans. Overall, the program emphasizes practical insights and actionable takeaways, helping participants align on industry priorities and enhance decision-making in a rapidly evolving environment.
Website	5th Annual Retirement Plan Advisor Summit
Contact	cynthia.huynh@institutionalinvestor.com
Fees	Not available. Contact organizer for more information.
Fall 2026 Conference – Council of Institutional Investors **09/30-10/02/2026** **Boston, MA**	The CII Fall 2026 Conference is a leading institutional investor event focused on corporate governance, investment stewardship, regulatory developments, AI, climate considerations, and long-term asset management trends. The program combines expert-led plenary sessions, member-driven discussions, and networking opportunities for asset owners and investment professionals.
Website	CII Fall 2026 Conference: Boston, MA
Contact	michael@cii.org
Fees	Based on membership type. Contact events@cii.org for more information.

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2026 Event Title — Organizer, Date, and Location	Overview and Audience
Annual Conference – National Council on Teacher Retirement (NCTR) **10/03-06/2026** **Coeur D'Alene, ID**	Website is password protected for members only.
Website	Annual Conference – NCTR
Contact	(916) 769-5909
Fees	Must log in as member to view.
P&I Convergence 2026 – Pensions & Investments **10/06-08/2026** **New York, NY**	P&I Convergence is Pensions & Investments' new flagship, three-day, one-stop event for institutional allocators that tackles total-portfolio investing and governance challenges in a single, time-efficient program. By combining content from prior fixed income, public funds, and derisking events, it offers curated sessions across traditional and alternative asset classes, holistic risk management, and derisking strategies. It also includes broad networking among pensions, endowments and foundations, insurers, healthcare investors, and other asset owners.
Website	HOME - 2026 P&I Convergence
Contact	kjackson@pionline.com, andy.jenkins@pionline.com
Fees	Complementary for Asset Owners
Consultant Roundtable – Institutional Investor **10/07-08/2026** **Chicago, IL**	This conference is designed to help institutional investors navigate a rapidly evolving investment landscape shaped by higher interest rates, technological innovation, and shifting geopolitical dynamics. Through a series of discussions and presentations, it explores how these forces are redefining asset allocation, market structure, and global economic relationships, while equipping participants with the insights needed to interpret change, adapt strategies, and respond effectively in an increasingly complex environment.
Website	Consultants & Institutional Investors Roundtable
Contact	bdoshi@iiforums.com
Fees	Not available. Contact organizer for more information.
Advanced Fiduciary (NAF) Institute – National Conference on Public Employee Retirement Systems (NCPERS) **10/24-25/2026** **Nashville, TN**	The NCPERS Advanced Fiduciary (NAF) Institute is a two-day, small-group program for public pension professionals and trustees, held October 24–25, 2026 in Nashville. Through real-world case studies, attendees deepen their skills in governance, finance, risk management, and human capital to strengthen board performance, manage risk, and lead resilient pension

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	funds, ultimately working toward the Advanced Fiduciary (AF) credential.
Website	2026 Fall Advanced Fiduciary Institute - National Conference on Public Employee Retirement Systems
Contact	registration@ncpers.org
Fees	$930. Increase to $1,130 on 10/1.
Fiduciary in Focus Workshop - National Conference on Public Employee Retirement Systems (NCPERS) **10/24-25/2026** **Nashville, TN**	The NCPERS Fiduciary in Focus Workshop is an advanced, small-group program designed to help trustees and pension staff deepen their understanding of key fiduciary responsibilities and practical decision-making. Through hands-on exercises, interactive discussions, and expert-led instruction, the workshop focuses on timely, high-impact topics, equipping participants with the tools and insights needed to address today's most pressing challenges in pension governance. Held each fall ahead of the broader NCPERS conference, it provides an immersive learning environment for more focused skill development and peer engagement.
Website	Fiduciary in Focus Workshop - National Conference on Public Employee Retirement Systems
Contact	registration@ncpers.org
Fees	$930. Increase to $1,130 on 10/1.
Fall Conference – State Association of County Retirement Systems (SACRS) **11/10-13/2026** **Rancho Mirage, CA**	The SACRS Annual Fall Conference 2026, taking place November 10–13 in Rancho Mirage, CA, is a multi-day event designed to provide public pension stakeholders with practical insights into today's complex investment and governance environment. The program focuses on equipping attendees with actionable perspectives on fiduciary responsibility, current financial market conditions, geopolitical influences, and modern investment management strategies, helping participants stay informed and make more effective decisions in an evolving landscape.
Website	SACRS > Events > Fall Conference
Contact	sacrs@sacrs.org
Fees	Early pricing: $1,360 Regular pricing: $1,560 Late pricing $1,760 Non-Member standard registration: $3,400

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08/08/2026	Boston, MA	Annual Conference — National Association of State Retirement Administrators (NASRA)
08/17/2026	Chicago, IL	Public Pension Funding Forum — National Conference on Public Employee Retirement Systems (NCPERS)
09/09/2026	Cincinnati, OH	CIO Lab: Cincinnati – Institutional Investor
09/29/2026	Santa Monica, CA	Annual Retirement Plan Advisor Summit – Institutional Investor
09/30/2026	Boston, MA	Fall 2026 Conference – Council of Institutional Investors
10/06/2026	New York, NY	P&I Convergence 2026 – Pensions & Investments
10/03/2026	Coeur D'Alene, ID	Annual Conference – National Council on Teacher Retirement
10/07/2026	Chicago, IL	Consultant Roundtable – Institutional Investor
10/24/2025	Nashville, TN	Advanced Fiduciary (NAF) Institute – National Conference on Public Employee Retirement Systems (NCPERS)
10/24/2026	Nashville, TN	Fiduciary in Focus Workshop – National Conference on Public Employee Retirement Systems (NCPERS)
11/10/2026	Rancho Mirage, CA	Fall Conference – State Association of County Retirement Systems (SACRS)

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