CORTEX
APPLIED RESEARCH

The Cortex Report

Customized for the

San José Retirement Boards

September 2018

This page is intentionally left blank

Introduction

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

Education events are sorted in chronological order, and include information such as event name, event sponsor/provider, date, target audience, 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.

In customizing your report, we have selected education events based on the following parameters, as determined in consultation with your staff:

- **Event target audience:** US Public Sector Funds.
- **Event location:** Continental United States and Canada.
- **Major topic areas:** General, Investments, Operations, Pension Plan Policy, Board Governance and Leadership, Risk Management.

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

This page is intentionally left blank

Table of Contents

Table of Contents

Table of Contents

Event Listings

Conference: **PRI in Person**

Organizer: Principles for Responsible Investment (PRI)

Location: San Francisco, California

Start Date: September 12, 2018

End Date: September 14, 2018

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

Topic Area: Corporate Governance

Attendance: Open To All

This conference provides a platform for PRI signatories and other investment professionals to learn, network and collaborate in person over a three-day period. The annual event allows attendees to discuss topical issues and share experiences from their own organisation and region with peers from around the world.

The conference will run alongside the Global Climate Action Summit, a major event organised by the State of California, which will bring together leaders from government, business and the global community to inspire greater global ambition to act on climate. In line with this, investor action on climate change will be a key focus for PRI in Person 2018, but it will also cover a wide range of other themes including ESG integration, active ownership and emerging ESG issues.

See the conference website for more information and the latest agenda.

Fees

$1,799 - Non-signatory
$1,499 - Signatory
Registration is closed but you can add your name to a waitist.

Contact

Ilga Miglane
Phone: +44 (0)20 3714 3177

Email

events@unpri.org

Link: http://www.cvent.com/events/pri-in-person-2018/event-summary-5a2f15d64e534edb8f77813a1c7eb7de.aspx

Conference: **Public Pension Funding Forum**

Organizer: National Conference on Public Employee Retirement Systems

Location: Boston, Massachusetts

Start Date: September 16, 2018

End Date: September 18, 2018

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

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.

See the conference website for more information and a preliminary agenda.

Fees

$750
$100 discount for registration by August 23, 2018

Contact

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

Email

registration@ncpers.org

Link: http://www.ncpers.org/fundingforum

Conference: **Investment Conference**

Organizer: BCA Research - Approved by the CFA Institute

Location: Toronto, Ontario, Canada

Start Date: September 23, 2018

End Date: September 25, 2018

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

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.

This conference will bring you diverse thinkers from the worlds of finance, politics and economics to assess the risks and opportunities facing the global investment industry. The theme for this conference is: "Investing in a Late-Cycle Environment". The keynote speakers will be:
-- Janet L. Yellen, former Chair of the Federal Reserve, and
-- The Right Honourable Stephen Harper, former Prime Minister of Canada

See the website for more information and a full agenda.

Fees

$4,650 - plus taxes

Contact

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

Email

support@bcaresearch.com

Link: http://interactive.bcaresearch.com/investmentconference

---

Conference: **East Coast Private Equity Summit**

Organizer: Institutional Investor

Location: Toronto, Canada

Start Date: September 27, 2018

End Date: September 27, 2018

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

Topic Area: Investments

Attendance: By Invitation Only

This summit will explore the interaction and interdependency of the various constituents of private markets. Utilizing a private, closed-door format, it will provide qualified LPs and GPs with the opportunity to engage and interact with industry peers in order to share ideas regarding opportunities, concerns and trends in order to build out a network of like-minded thought leaders.

See the conference website for more information and a preliminary agenda.

Fees

Not available. Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: https://www.iiconferences.com/Alternative-Investor-Institute/East-Coast-Private-Equity-Summit

Conference: **FinTech II**
Organizer: Journal of Investment Management - Approved by the CFA Institute
Location: Cambridge, Massachusetts
Start Date: September 30, 2018
End Date: October 02, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

It became apparent from last year's FinTech Conference that there is widespread interest as well as extensive topics associated with this theme. Fintech II will focus on areas such as cybercurrencies, blockchain technology and robo investing. These all have high potential disruptive impacts. Speakers from academia as well as practitioners will share not only educational content but insights on the practical significance of these emerging technologies.

This conference is co-sponsored with Massachusetts Institute of Technology, MIT Sloan Finance Group & BlackRock.

See the conference website for more information.

Fees

$5,000 - annual membership (Spring & Fall Conference)
$3,000 - guest (single conference)

Contact

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

Email

customerservice@joim.com

Link: https://www.joim.com/conference-series/

Conference: **Pension Risk Strategies Summit**
Organizer: Pensions & Investments
Location: Atlanta, Georgia
Start Date: October 02, 2018
End Date: October 02, 2018
Alternative Date(s) & Location(s) October 4, 2018, Dallas TX
October 9, 2018, Chicago IL
October 11, 2018, New York NY

Topic Area: Pension Plan Policy
Attendance: By Invitation Only

This summit features case studies presented by pension fund fiduciaries and investment managers who discuss their pension risk strategies and why they were chosen. Topics covered will include:
- The current economic factors driving pension risk strategy decisions
- Update on the regulatory landscape and the implications for pension risk management
- Governance considerations to ensure successful pension risk management
- Understanding fiduciary requirements to ensure compliance
- Managing fund volatility with hedging techniques
- A survey of risk management and de-risking strategies and when they are indicated
- Monitoring the risk management strategy and making adjustments as needed

See the conference website for more information and a preliminary agenda.

Fees

No charge. Registration open only to plan sponsors and a limited number of investment consultants, plus conference sponsors.

Contact

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

Email

pi-registration@pionline.com

Link: http://conferences.pionline.com/conference/pension-risk/2018

Conference: **Roundtable for Consultants & Institutional Investors**

Organizer: Institutional Investor

Location: Chicago, Illinois

Start Date: October 02, 2018

End Date: October 05, 2018

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

Topic Area: Investments

Attendance: By Invitation Only

Ten years of bull markets and sustained economic growth – despite geopolitical contention – offer CIOs and investment consultants the opportunity to debate and reflect on the paradigms on the business of institutional asset management. The Roundtable will focus on the clashes of asset management, the pivotal arguments to be had on asset classes, approaches, risks, rewards, and the future of the industry.

See the conference website for more information and a preliminary agenda.

Fees

No charge. Limited to "qualified investment executives" of institutional funds. 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.iiconferences.com/Institutional-Investor-Conferences/Consultants-Roundtable

Conference: **Talent Acquisition Conference**

Organizer: The Conference Board

Location: New York, New York

Start Date: October 02, 2018

End Date: October 03, 2018

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

Topic Area: Human Resources

Attendance: Open To All

The theme for this conference is: "Bigger Fish: Acquiring Agile, High-Potential Talent for Business Impact". Talent acquisition has significantly changed recently in our rapidly changing world. As a function, new technologies have been introduced, new organizational structures have been created, new sourcing strategies have emerged, effective employment branding is now a necessity and there is an increasing focus on the candidate experience.

• Big Fish have more choices of where to work and greater access to opportunities
• Digitalization changes what we do and how we do it
• Data analytics will help identify high potential candidates
• Plus there are new trends in recruiting fueled technology and the Internet making talent acquisition an interesting topic

This conference will explore strategies and innovations you should consider and implement now in order to stay ahead of your competitors in the next decade.

See the conference website for more information and a preliminary agenda.

Fees

$2,895 - non-members
$2,295 - members

Contact

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

Email

customer.service@conferenceboard.org

Link: https://www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=2952

Conference: **Annual Institutional Investor Real Estate Conference**

Organizer: Pension Real Estate Association (PREA)

Location: Boston, Massachusetts

Start Date: October 03, 2018

End Date: October 05, 2018

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

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 conference website for more information and a preliminary agenda.

Fees

$415 - non-member
$110 - member

Contact

Rachel Anderson
Director, Member Services
Phone: 860-785-3846
Fax: 860-692-6351

Email

rachel@prea.org

Link: https://www.prea.org/fall2018/

Conference: **Pension Risk Strategies Summit**

Organizer: Pensions & Investments

Location: Dallas, Texas

Start Date: October 04, 2018

End Date: October 04, 2018

Alternative Date(s) & Location(s) October 2, 2018, Atlanta, GA
October 9, 2018, Chicago IL
October 11, 2018, New York NY

Topic Area: Pension Plan Policy

Attendance: By Invitation Only

This summit features case studies presented by pension fund fiduciaries and investment managers who discuss their pension risk strategies and why they were chosen. Topics covered will include:

- The current economic factors driving pension risk strategy decisions
- Update on the regulatory landscape and the implications for pension risk management
- Governance considerations to ensure successful pension risk management
- Understanding fiduciary requirements to ensure compliance
- Managing fund volatility with hedging techniques
- A survey of risk management and de-risking strategies and when they are indicated
- Monitoring the risk management strategy and making adjustments as needed

See the conference website for more information and a preliminary agenda.

Fees

No charge. Registration open only to plan sponsors and a limited number of investment consultants, plus conference sponsors.

Contact

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

Email

pi-registration@pionline.com

Link: http://conferences.pionline.com/conference/pension-risk/2018

Conference: **Annual Conference**

Organizer: National Council on Teacher Retirement (NCTR)

Location: Washington, District of Columbia

Start Date: October 07, 2018

End Date: October 09, 2018

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

Topic Area: General

Attendance: Members Only

The National Council on Teacher Retirement (NCTR) is constituted as an independent association dedicated to safeguarding the integrity of public retirement systems in the United States and its territories to which teachers belong and to promoting the rights and benefits of all present and future members of the systems. NCTR membership includes 68 state, territorial, and local pension systems. These systems serve more than 19 million active and retired teachers, non-teaching personnel, and other public employees; and have combined assets of over $2 trillion in their trust funds.

See the conference website for more information and a preliminary agenda.

Fees

$1,400
$150 discount for registration by September 10, 2018

Contact

Robyn Wheeler
Phone: (916) 897-9139
Fax: (916) 897-9315

Email

rwheeler@nctr.org

Link: http://www.nctr.org/events/conferences/

Conference: **Pension Risk Strategies Summit**

Organizer: Pensions & Investments

Location: Chicago, Illinois

Start Date: October 09, 2018

End Date: October 09, 2018

Alternative Date(s) & Location(s) October 2, 2018, Atlanta, GA
October 4, 2018, Dallas TX
October 11, 2018, New York NY

Topic Area: Pension Plan Policy

Attendance: By Invitation Only

This summit features case studies presented by pension fund fiduciaries and investment managers who discuss their pension risk strategies and why they were chosen. Topics covered will include:

- The current economic factors driving pension risk strategy decisions
- Update on the regulatory landscape and the implications for pension risk management
- Governance considerations to ensure successful pension risk management
- Understanding fiduciary requirements to ensure compliance
- Managing fund volatility with hedging techniques
- A survey of risk management and de-risking strategies and when they are indicated
- Monitoring the risk management strategy and making adjustments as needed

See the conference website for more information and a preliminary agenda.

Fees

No charge. Registration open only to plan sponsors and a limited number of investment consultants, plus conference sponsors.

Contact

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

Email

pi-registration@pionline.com

Link: http://conferences.pionline.com/conference/pension-risk/2018

Conference: **Pension Risk Strategies Summit**

Organizer: Pensions & Investments

Location: New York, New York

Start Date: October 11, 2018

End Date: October 11, 2018

Alternative Date(s) & Location(s) October 2, 2018, Atlanta, GA
October 4, 2018, Dallas TX
October 9, 2018, Chicago IL

Topic Area: Pension Plan Policy

Attendance: By Invitation Only

This summit features case studies presented by pension fund fiduciaries and investment managers who discuss their pension risk strategies and why they were chosen. Topics covered will include:

- The current economic factors driving pension risk strategy decisions
- Update on the regulatory landscape and the implications for pension risk management
- Governance considerations to ensure successful pension risk management
- Understanding fiduciary requirements to ensure compliance
- Managing fund volatility with hedging techniques
- A survey of risk management and de-risking strategies and when they are indicated
- Monitoring the risk management strategy and making adjustments as needed

See the conference website for more information and a preliminary agenda.

Fees

No charge. Registration open only to plan sponsors and a limited number of investment consultants, plus conference sponsors.

Contact

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

Email

pi-registration@pionline.com

Link: http://conferences.pionline.com/conference/pension-risk/2018

Conference: **Fixed Income Management**

Organizer: CFA Institute - Hosted with the CFA Society Boston

Location: Boston, Massachusetts

Start Date: October 11, 2018

End Date: October 12, 2018

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

Topic Area: Investments

Attendance: Open To All

At this conference, leading practitioners and researchers will navigate what is happening in global bond markets, take a closer look at the path to interest rate normalization, and discuss prospects for economic growth in developed and emerging economies. Covering practical topics that address fixed-income sectors, security selection, and portfolio construction, the conference brings together top researchers, strategists, analysts, and portfolio managers focused on uncovering investment ideas and strategies that can be used to successfully meet client objectives. Discover where discerning investors are finding opportunities in fixed-income markets for diversification, value, and protection against uncertainty.

See the conference website for more information and a preliminary agenda.

Fees

$1,595 - non-members
$1,295 - CFA members
$200 discount for registration by September 11, 2018.

Contact

Phone: (434) 951-5499
Toll-free: 1 (800) 247-8132
Fax: (434) 951-5262

Email

ceprogram@cfainstitute.org

Link: https://www.cfainstitute.org/en/events/conferences/fixed-income-2018

Conference: **Annual Conference**
Organizer: Public Pension Financial Forum (P2F2)
Location: Savannah, Georgia

Start Date: October 21, 2018
End Date: October 24, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: Operations
Attendance: Open To All

The Public Pension Financial Forum is organized for education, pension advocacy and networking purposes for public pension plans. The theme for this year's conference is "Financial Leadership at the Helm". It includes a pre-conference with 2 tracks, one focused on basic and advanced actuarial topics and one focused on basic and advanced institutional investor topics. The main conference will include a comprehensive array of general sessions on topics ranging from communications to ethics.

See the conference website for more information.

Fees

$500
$100 discount for registration by August 17, 2018

Contact

Phone: 614-227-0059

Email

information@p2f2.org

Link: https://www.p2f2.org/annualconference

Conference: **Annual Conference**
Organizer: American Society of Pension Professionals & Actuaries (ASPPA)
Location: National Harbor, Maryland

Start Date: October 21, 2018
End Date: October 24, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: General
Attendance: Open To All

ASPPA is a non-profit professional organization with two major goals: to educate retirement plan professionals, and to create a framework of public policy that gives every working American the ability to have a comfortable retirement. In pursuit of these goals, ASPPA offers its more than 7,000 members extensive educational opportunities, paired with a strong advocacy operation. While ASPPA began in 1966 as an actuarial organization, they have changed to reflect the shifts in the retirement plan industry. As a result, ASPPA now represents business owners, actuaries, TPAS, record keepers, consultants and more.

See the conference website for a preliminary agenda.

Fees

$1,715 - non-members
$1,410 - members
$300 discount for registration by September 14, 2018

Contact

Phone: 703.516.9300
Fax: 703.516.9308

Email

customercare@asppa-net.org

Link: http://asppaannual.org/

Course: **Investment Strategies and Portfolio Management**

Organizer: The Wharton School, University of Pennsylvania

Location: Philadelphia, Pennsylvania

Start Date: October 22, 2018

End Date: October 26, 2018

Alternative Date(s) & Location(s) June 3-7, 2019, Philadelphia, PA

Topic Area: Investments

Attendance: Open To All

This program provides a solid understanding of today's investment landscape and the tools and theories for developing and measuring the performance of portfolios. It explores individual asset classes, including bonds, hedge funds, private equity, derivatives, real estate, and international markets in sessions designed to help participants better understand when to include these investments in their portfolios. Industry experts offer real-world experience and expertise, helping participants understand how theories and frameworks can be put into practice. Session topics include:

- Modern Portfolio Theory
- Performance Measurement
- Evaluating Managers and Strategies
- Advanced Asset Allocation
- Investment Policy
- Outlook for the Economy and Navigating Its Risk

See the website for more information about the program.

Fees

$10,750

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: **New York Event**

Organizer: International Corporate Governance Network (ICGN)

Location: New York, New York

Start Date: October 22, 2018

End Date: October 22, 2018

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

Topic Area: Corporate Governance

Attendance: Open To All

This event will be hosted by the New York City Comptroller and is expected to attract around 200 participants. The rise of populism across the continent and the US has meant it is certainly no longer 'business as usual' and many are questioning the future implications for corporate governance. As policy continues to evolve, the event will explore the corporate governance questions for companies and their boards and ask how these developments may affect global investors.

See the conference website for more information and a preliminary agenda.

Fees

£530 - non-member
£380 - member

Contact

Elle Thomas
Head of Events
Phone: +44 (0) 207 612 7011

Email

elizabeth.thomas@icgn.org

Link: https://www.icgn.org/events/icgn-new-york-event

Conference: **Fall Conference**
Organizer: Council of Institutional Investors
Location: Boston, Massachusetts
Start Date: October 24, 2018
End Date: October 26, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: Corporate Governance
Attendance: Members Only

The Council of Institutional Investors (CII) is a nonprofit, nonpartisan association of pension funds, other employee benefit funds, endowments and foundations, with combined assets that exceed $3.5 trillion. Its non-voting members include asset management firms with more than $25 trillion under management. It is a leading voice for effective corporate governance, strong shareowner rights and vibrant, transparent and fair capital markets.

CII holds two conferences a year, a spring meeting in Washington, D.C., and a fall conference that rotates between the east and west coasts. The conferences offer opportunities to interact, share best practices and learn from representatives from major institutional investors, regulators, legislators and other corporate governance professionals.

See the conference website for more information.

Fees

$1,500 plus membership fee of $0.65 per $1 million AUM (min/max $3,500 - $24,000). Bundled fee = $0.95 per $1 million.

Contact

Michael Miller
Phone: 202.822.0800

Email

michael@cii.org

Link: http://www.cii.org/ev_calendar_day.asp?date=10%2F24%2F18&eventid=6

Conference: **Trustees' Roundtable**
Organizer: California Association of Public Retirement Systems (CALAPRS)
Location: Glendale, California
Start Date: October 26, 2018
End Date: October 26, 2018
Alternative Date(s) & Location(s) N/A

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.

More information about the conference is available exclusively to CALAPRS member systems and sponsors. Please visit the website to 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=1113246&group=

Conference: **Public Safety Conference**
Organizer: National Conference on Public Employee Retirement Systems
Location: Las Vegas, Nevada

Start Date: October 28, 2018
End Date: October 31, 2018
Alternative Date(s) & Location(s) N/A

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.

See the conference website for more information and a preliminary agenda.

Fees

$800
$100 discount for registration by October 5, 2018

Contact

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

Email

registration@ncpers.org

Link: http://www.ncpers.org/psc

Course: **Private Equity: Investing and Creating Value**
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania

Start Date: October 29, 2018
End Date: November 02, 2018
Alternative Date(s) & Location(s) April 8-12, 2019, Philadelphia PA

Topic Area: Investments
Attendance: Open To All

This program is designed for institutional investors as well as investment professionals aspiring to be better private equity managers. It will deliver the latest information about the private equity sector, while teaching the latest concepts investors need to know to confidently evaluate investment opportunities in the private equity space and build optimal investment processes. During the program, participants will have an opportunity to focus on areas of individual interest, such as the limited partner perspective and private equity in emerging markets. Participants will learn the landscape of the private equity space and be exposed to concepts and tools that are used by private equity managers today.

See the website for more information about the program.

Fees

$10,750

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference: **Equity Research and Valuation**
Start Date: November 06, 2018
Organizer: CFA Institute - Hosted with the CFA Society New York
End Date: November 07, 2018
Location: New York, New York
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

This conference aims to keep investment managers abreast of the latest advances and developments in equity research techniques, valuation, and portfolio management. The application of new technologies in portfolio management will be a key theme for the conference, and speakers will discuss such topics as the use of artificial intelligence, data analytics, and quantitative techniques in investment decision making and how blockchain could disrupt a number of industries, including financial services. Topics for discussion will include valuation approaches and analysis, global investment strategies, research methods, how to better understand and analyze portfolio risks, and the top challenges equity investors face today.

More information about the conference is not yet available.

Fees

$1,295 - non-members
$1,095 - CFA members
$300 discount for registration by October 5, 2018.

Contact

Phone: (434) 951-5499
Toll-free: 1 (800) 247-8132
Fax: (434) 951-5262

Email

ceprogram@cfainstitute.org

Link: https://www.cfainstitute.org/en/events/conferences/equity-2018

Conference: **Succession Management Conference**
Start Date: November 08, 2018
Organizer: The Conference Board
End Date: November 09, 2018
Location: New York, New York
Alternative Date(s) & Location(s) N/A

Topic Area: Human Resources
Attendance: Open To All

The theme for this conference is: "Future-proofing Your Pipeline Strategies in a New World of Work". Is your organization building a succession pipeline that is future oriented and ready for the continuous market disruptions and digital transformation? Are you ready to let go of dated succession processes and legacy systems and to embrace new approaches and solutions for succession management? This conference will focus on new practices that take Succession Management into the future and enhance your organization's ability to realize its strategic ambitions.

See the conference website for more information and a preliminary agenda.

Fees

$2,895 - non-members
$2,295 - members
$400 discount for registration by September 1, 2018

Contact

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

Email

customer.service@conferenceboard.org

Link: https://www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=2958

Conference: **University of Virginia Investing Conference**
Organizer: Darden School of Business, University of Virginia
Location: Charlottesville, Virginia

Start Date: November 08, 2018
End Date: November 09, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

This conference, hosted by the Richard A. Mayo Center for Asset Management, will reflect on the 10th anniversary of the global financial crisis. The speakers and program will look both back and forward, focusing on what we have learned since the crisis unfolded and what we need to know moving forward. The program will feature leading experts across academia, industry and government, speaking and presenting on critical topics central to the financial crisis – and the path forward.

See the conference website for more information.

Fees

$275

Contact

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

Email

SwingS@darden.virginia.edu

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

Conference: **Executive Compensation Conference**
Organizer: The Conference Board
Location: New York, New York

Start Date: November 08, 2018
End Date: November 09, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: Human Resources
Attendance: Open To All

The executive compensation environment continues to evolve and the benchmarked best practices continue to change. The conference will discuss how companies are implementing SEC rules (e.g. Pay Ratio), improved incentive designs to ensure greater pay-for-performance alignment and much better communications as our investors and other stakeholders are demanding enhanced disclosures. There is a major issue of public trust of compensation outcomes. Other topics include:

- Selecting short, medium and long-term performance metrics
- Global issues in executive compensation
- Board of Directors compensation issues

See the conference website for more information and a preliminary agenda.

Fees

$2,895 - non-members
$2,295 - members
$400 discount for registration by September 1, 2018

Contact

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

Email

customer.service@conferenceboard.org

Link: https://www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=2966

Course: **Harvesting Risk Premia in Equity and Bonds Markets**

Organizer: Yale School of Management and EDHEC-Risk Institute

Location: New Haven, Connecticut

Start Date: November 12, 2018

End Date: November 14, 2018

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

Topic Area: Investments

Attendance: Open To All

The second seminar of the series has been designed to offer participants an in-depth discussion on modern factor investing approaches in equity and bond markets. A new approach known as factor investing has recently emerged in investment practice, which recommends that allocation decisions be expressed in terms of risk factors, as opposed to standard asset class decompositions. While risk factors have long been used for the risk and performance evaluation of actively managed portfolios, the current focus is on identifying the proper framework under which factor investing and risk allocation are expected to generate welfare gains for asset owners. In particular, the emergence of so-called smart beta investment solutions, which is blurring the traditional clear-cut split between active and passive equity portfolio management, puts the emphasis on efficient harvesting of risk premia across and within asset classes.

See the website for more information about the program.

Fees

$6,650

Contact

David Pramer, Yale School of Management
Phone: +1 203 432 6268

Email

david.pramer@yale.edu

Link: https://risk.edhec.edu/equity-and-bond-markets-seminar

Conference: **Multi-Asset Investing**

Organizer: Pensions & Investments

Location: Chicago, Illinois

Start Date: November 13, 2018

End Date: November 13, 2018

Alternative Date(s) & Location(s) November 15, 2018, New York NY

Topic Area: Investments

Attendance: Open To All

After nearly a decade-long bull run, there exists a strong feeling that a correction is inevitable. Investors are turning, more and more, to multi-asset strategies that have the potential for upside plus the protection against downside that a risk-managed portfolio can deliver. Topics to be discussed at this conference include:

• Dynamic portfolio risk management: what to do if the worst is yet to come?
• Diversification and exploring the toolkit of asset classes, factors, styles and managers
• Alternative risk premia solutions: beyond stocks and bonds
• Managing alpha vs managing beta
• Strategies & Sectors: Core plus, global aggregate, unconstrained fixed income and credit, regime-based, derivatives, factors, volatility, options, ETFs and core equity among others
• Targeting and measuring outcomes: whether growth, income, inflation protection, getting proper alignment with the intended outcome?

See the conference website for more information and a preliminary agenda.

Fees

Not available. Please contact conference organizer.

Contact

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

Email

pi-registration@pionline.com

Link: http://conferences.pionline.com/conference/multi-asset/2018

Conference: **Fall Conference**

Organizer: State Association of County Retirement Systems (SACRS)

Location: Indian Wells, California

Start Date: November 13, 2018

End Date: November 16, 2018

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

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.

More information about the conference is not yet available.

Fees

$120

Contact

Phone: 916-441-1850
Fax: 916-441-6178

Email

sacrs@sacrs.org

Link: https://sacrs.org/events/fall-conference/

Course: **Global Investment Forum**

Organizer: Mercer

Location: Montreal, Quebec, Canada

Start Date: November 13, 2018

End Date: November 13, 2018

Alternative Date(s) & Location(s) October 11-12, 2018 Munich

Topic Area: Investments

Attendance: Not Yet Available

A clear articulation of an investor's beliefs, objectives, and constraints is essential to effective governance and decision-making. For long-term investors, beliefs should extend beyond traditional risk and return considerations to include stewardship and ESG issues. This forum considers both the wider market forces as well as investor-specific issues that will help investors plot a course towards long-term success. It provides the setting for stimulating and informative discussions on the economy, institutional investments, pension plan management, and more.

See the website for more information about the program.

Fees

No charge for Mercer clients. Others should contact the conference organizer.

Contact

Alexis Livesey
Phone: +1 201 744 1758

Email

alexis.livesey@mercer.com

Link: http://www.mercersignatureevents.com/investmentforums/2018/index.shtml

Course: **Investment Decisions and Behavioral Finance**
Organizer: Harvard Kennedy School
Location: Cambridge, Massachusetts
Start Date: November 14, 2018
End Date: November 16, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

Common biases. Irrational investment behaviors. Decision-trap situations. In today's ever-changing and complex financial markets, senior executives responsible for managing client assets need to understand the factors that produce sub-optimal outcomes for investors.

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.

See the website for more information about the program.

Fees

$5,100
Application deadline:
October 14, 2018.

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: **Multi-Asset Investing**
Organizer: Pensions & Investments
Location: New York, New York
Start Date: November 15, 2018
End Date: November 15, 2018
Alternative Date(s) & Location(s) November 13, 2018, Chicago IL

Topic Area: Investments
Attendance: Open To All

After nearly a decade-long bull run, there exists a strong feeling that a correction is inevitable. Investors are turning, more and more, to multi-asset strategies that have the potential for upside plus the protection against downside that a risk-managed portfolio can deliver. Topics to be discussed at this conference include:

• Dynamic portfolio risk management: what to do if the worst is yet to come?
• Diversification and exploring the toolkit of asset classes, factors, styles and managers
• Alternative risk premia solutions: beyond stocks and bonds
• Managing alpha vs managing beta
• Strategies & Sectors: Core plus, global aggregate, unconstrained fixed income and credit, regime-based, derivatives, factors, volatility, options, ETFs and core equity among others
• Targeting and measuring outcomes: whether growth, income, inflation protection, getting proper alignment with the intended outcome?

See the conference website for more information and a preliminary agenda.

Fees

Not available. Please contact conference organizer.

Contact

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

Email

pi-registration@pionline.com

Link: http://conferences.pionline.com/conference/multi-asset/2018

Course: **NFP Program**

Start Date: November 21, 2018

Organizer: Institute of Corporate Directors and Rotman School of Management (U of

End Date: November 22, 2018

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) Feb. 11-12, 2019, Edmonton AB
March 25-26, 2019, Ottawa ON
May 13-14, 2019, Vancouver BC

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program focuses on key accountabilities and responsibilities of leaders of not-for-profit (NFP) organizations through extensive use of team-based learning to ensure participants learn from both faculty and their peers.

Attend this program and gain the following benefits:
- Understand your fiduciary duty
- Learn best practices in governance
- Build group decision-making skills
- Apply change management principles to elevate board effectiveness

See the website for more information about the program.

Fees

$2,500 CAD + tax
Application deadline: October 18, 2018

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: http://www.icd.ca/Courses/NFP-Program.aspx

Course: **Board Risk Oversight and Insight Program**

Start Date: November 27, 2018

Organizer: Global Risk Institute & Rotman School of Management, University of

End Date: November 28, 2018

Location: Toronto, Ontario, Canada

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

Topic Area: Board Governance & Leadership

Attendance: Members Only

This program covers key aspects of risk oversight responsibilities of boards and their directors in the financial services sector. It provides:

• Exposure to risk oversight best practices and emerging trends
• Opportunities to gain insight regarding risk management practices and approaches employed by the boards of other GRI member financial institutions
• An appreciation and application of risk appetite frameworks including fostering a healthy risk culture
• Opportunities to explore with faculty experts, as well as board peers, the types of questions that directors should be posing to corporate risk professionals
• Networking with director peers in an interactive learning environment

See the website for more information about the program.

Fees

Not available.
Please contact conference organizer.

Contact

Maria Montes
Events Manager
Phone: +1 (416) 306-1182

Email

mmontes@globalriskinstitute.org

Link: http://globalriskinstitute.org/education/board-risk-oversight-and-insight/

Course: **Value Investing**
Organizer: Columbia Business School
Location: New York, New York

Start Date: December 04, 2018
End Date: December 06, 2018
Alternative Date(s) & Location(s) June 4-6, 2019, New York NY

Topic Area: Investments
Attendance: Open To All

Based on the Ben Graham or Warren Buffett approach to allocating capital, this exclusive program will teach the frameworks and processes of investing that some of the most successful investors in the world employ to manage and preserve capital.

You will learn to use quantitative valuation techniques, such as arbitrage, asset-based approaches and the earning power method, and you will effectively combine those tools with strategic methodologies for estimating franchise value. Three real-world case studies enable more precise estimation of investment risk and improve your ability to manage a value portfolio.

See the website for more information about the program and to download the agenda.

Fees

$7,500

Contact

Liz N. Schultz
Senior Associate Director,
Learning Solutions
Phone: 212-854-7613

Email

Lns11@gsb.columbia.edu

Link: https://www8.gsb.columbia.edu/execed/program-pages/details/61/VI?sourceid=LeftNav

Conference: **Liability Driven Investing Conference**
Organizer: Pensions & Investments
Location: Chicago, Illinois

Start Date: December 04, 2018
End Date: December 04, 2018
Alternative Date(s) & Location(s) December 6, 2018, New York NY

Topic Area: Investments
Attendance: By Invitation Only

This conference will examine the latest trends for designing, implementing, and managing an LDI strategy. Plan sponsors and investment managers will learn how to create a customized LDI strategy, how different assets work in the investment portfolio, and the governance structures needed to ensure success.
Topics to be discussed include:
• Reducing surplus volatility for the investments and the funded status
• Incorporating swaptions and other structured products to hedge interest rates
• Creating a glidepath that ensures timely adjustments to changes in funded status or the economic environment
• Governance structures that ensure on-target outcomes
• LDI strategies for DC plans

More information about the conference is not yet available.

Fees

Not available. Please contact conference organizer.

Contact

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

Email

pi-registration@pionline.com

Link: http://conferences.pionline.com/conference/liability-driven-investing/2018

Conference: **Systematic Investment Strategies Symposium**
Organizer: Institutional Investor
Location: Apella, New York
Start Date: December 04, 2018
End Date: December 05, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: By Invitation Only

More and a broader range of institutional investors are becoming interested in systematic investing and the role these strategies can play in their portfolios. But the rise in demand is itself changing the landscape and the opportunity set rapidly as more managers enter the space, as these principles and strategies are applied to asset classes outside of equities, and as the concept itself – some argue – begins to become commoditized. This symposium will assess the ways that pension funds, endowments, and foundations are increasingly employing systematic investment strategies to meet their investment objectives.

More information about the conference is not yet available.

Fees

No charge. Limited to "senior investment executives" of larger institutional funds. 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.iiconferences.com/Institutional-Investor-Forums/Systematic-Investment-Strategies-Symposium

---

Conference: **RI Americas**
Organizer: Responsible Investor
Location: New York, New York
Start Date: December 05, 2018
End Date: December 06, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

This conference provides a unique opportunity to learn, share and debate on responsible investment issues with 500+ investment professionals from across the globe. You will engage with North America’s largest investors on key themes affecting local markets and the rest of the world. Thought-leaders from across the institutional investment sector as well as academic researchers and scientists will come together to debate key issues.

See the conference website for more information.

Fees

No charge for asset owner and investment consultants.

Contact

Chido Hession
Phone: +44 20 7709 2094

Email

chido@responsible-investor.com

Link: https://www.eiseverywhere.com/ehome/350098

Conference: **Liability Driven Investing Conference**
Organizer: Pensions & Investments
Location: New York, New York
Start Date: December 06, 2018
End Date: December 06, 2018
Alternative Date(s) & Location(s) December 04, 2018, Chicago, IL

Topic Area: Investments
Attendance: By Invitation Only

This conference will examine the latest trends for designing, implementing, and managing an LDI strategy. Plan sponsors and investment managers will learn how to create a customized LDI strategy, how different assets work in the investment portfolio, and the governance structures needed to ensure success.
Topics to be discussed include:
• Reducing surplus volatility for the investments and the funded status
• Incorporating swaptions and other structured products to hedge interest rates
• Creating a glidepath that ensures timely adjustments to changes in funded status or the economic environment
• Governance structures that ensure on-target outcomes
• LDI strategies for DC plans

More information about the conference is not yet available.

Fees

Not available. Please contact conference organizer.

Contact

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

Email

pi-registration@pionline.com

Link: http://conferences.pionline.com/conference/liability-driven-investing/2018

Course: **Venture Capital**
Organizer: The Wharton School, University of Pennsylvania
Location: San Francisco, California
Start Date: December 09, 2018
End Date: December 13, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

This program will lift the veil on one of the most exciting and perhaps least transparent areas in finance. Designed for investors and entrepreneurs alike, participants will come away with a greater understanding of how venture capital (VC) works; how the best venture capitalists source, screen, and value deals; and how to design contracts that protect both investors and founders. It starts with a discussion on how VC funds are organized, how investments are selected, and how due diligence is conducted. Participants will examine case studies that detail a transaction from beginning to end. In this manner, participants will see how a deal is structured, learn more about the differing incentives of a VC fund and entrepreneurs, and gain a deeper understanding of venture investing.

See the website for more information about the program.

Fees

$10,250

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: https://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/venture-capital

Course: **Strategic Human Resource Management Program**
Organizer: Rotman School of Management, University of Toronto
Location: Toronto, Ontario, Canada
Start Date: January 21, 2019
End Date: January 25, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Human Resources
Attendance: Open To All

This program provides participants with an understanding of what constitutes strategic HR management, and introduces them to the concepts and tools required to implement it in their own organizations. Participants will be exposed to current best practices in HR management, including:
• The Nature of Strategy and Competitive Advantage
• Linking HR to Business Strategy
• Aligning HR Strategy & Structure
• Talent Management
• Integrated Leadership Development and Succession
• Building Employee Engagement
• Driving Change
• Defining and Fostering Culture

See the website for more information about the program.

Fees

CAD $9,000 + HST

Contact

Phone: 416-978-8932

Email

executiveprograms@rotman.utoronto.ca

Link: http://www.rotman.utoronto.ca/ProfessionalDevelopment/Executive-Programs/CoursesWorkshops/Programs/Strategic-HR-Management.aspx

Conference: **Legislative Conference**
Organizer: National Conference on Public Employee Retirement Systems
Location: Washington, District of Columbia
Start Date: January 27, 2019
End Date: January 29, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Pension Plan Policy
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.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fee: $500
$100 discount for registration by January 7, 2018

Contact

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

Email

registration@ncpers.org

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

Conference: **Solutions-Oriented Investing Forum: Managing Risk & Liquidity**

Start Date: January 29, 2019

Organizer: Institutional Investor

End Date: January 30, 2019

Location: San Francisco, California

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

Topic Area: Investments

Attendance: By Invitation Only

This Forum will present the latest, best thinking on the ways that North American pension funds and US endowments and foundations can respond to a volatile global investment landscape recognized for its rapidly changing dynamics. An opportunity and risk set which looks hardly at all like the world of even a few years ago – with one key exception, the continuing low rate environment which is driving so many strategic asset allocation decisions.

More information about the conference is not yet available.

Fees

No charge for corporate and public pension funds, endowments & foundations.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: https://www.iiconferences.com/Institutional-Investor-Forums/Solutions-Oriented-Investing-Forum-Managing-Risk-and-Liquidity

---

Course: **Harvesting Risk Premia in Alternative Asset Classes and Investment**

Start Date: February 05, 2019

Organizer: Yale School of Management and EDHEC-Risk Institute

End Date: February 07, 2019

Location: New Haven, Connecticut

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

Topic Area: Investments

Attendance: Open To All

The third seminar of the series has been designed to offer participants an in-depth discussion of alternative assets, commodity investing as well as the future of infrastructure investment. Investors are increasingly turning to alternative investments to find new ways of increasing the performance and decreasing the risk of their portfolio, in a context where the benefits of diversification within traditional equity and bond portfolios have decreased. Broadly speaking, this seminar shows how to deal with non-Gaussian returns, illiquid assets, and flawed data. It also presents qualitative and quantitative techniques to control asset-class exposures, and manages liquidity, valuation and counterparty risks for portfolio-wide decisions involving alternatives.

See the website for more information about the program.

Fees

Not yet available.

Contact

David Pramer, Yale School of Management
Phone: +1 203 432 6268

Email

david.pramer@yale.edu

Link: https://risk.edhec.edu/alternative-asset-classes-seminar

Course: **NFP Program**

Start Date: February 11, 2019

Organizer: Institute of Corporate Directors and Rotman School of Management (U of

End Date: February 12, 2019

Location: Edmonton, Alberta, Canada

Alternative Date(s) & Location(s) November 21-22, 2018, Toronto ON
March 25-26, 2019, Ottawa ON

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program focuses on key accountabilities and responsibilities of leaders of not-for-profit (NFP) organizations through extensive use of team-based learning to ensure participants learn from both faculty and their peers.

Attend this program and gain the following benefits:
- Understand your fiduciary duty
- Learn best practices in governance
- Build group decision-making skills
- Apply change management principles to elevate board effectiveness

See the website for more information about the program.

Fees

$2,500 CAD + tax
Application deadline: December 20, 2018

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: http://www.icd.ca/Courses/NFP-Program.aspx

Conference: **General Assembly**

Start Date: March 02, 2019

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 05, 2019

Location: Monterey, California

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

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 to 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: http://www.calaprs.org/events/EventDetails.aspx?id=973117&group=

Conference: **PREA Spring Conference**
Organizer: Pension Real Estate Association (PREA)
Location: Dallas, Texas
Start Date: March 14, 2019
End Date: March 15, 2019
Alternative Date(s) & Location(s) N/A

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 available.
Please contact the conference organizer.

Contact

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

Email

amy@prea.org

Link: http://spring2018.prea.org/

Course: **Audit Committee Effectiveness**
Organizer: Institute of Corporate Directors
Location: Toronto, Ontario, Canada
Start Date: March 20, 2019
End Date: March 20, 2019
Alternative Date(s) & Location(s) March 28, 2019, Vancouver BC

Topic Area: Board Governance & Leadership
Attendance: Open To All

This course is designed to help directors be most effective on the audit committee and move beyond the traditional role of compliance oversight. Dig into topics from annual work plans to management and auditor relationships to emerging national and global issues, including:
- Evolving regulations impacting Audit Committees today
- Role of the Audit Committee Chair and his/her relationship with other board and management stakeholders
- Audit Committee's role in risk oversight and risk management
- Internal and external audit functions, including relationship dynamics with the external auditor
- Other key external relationships including regulators
- Non-standard issues faced by Audit Committees including whistleblowers, fraud, and material restatements

See website for more information about the program.

Fees

$1,395 CAD - for non-members
$1,050 CAD - for ICD members
$950 - for ICD directors
Application deadline: February 20, 2019

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: http://www.icd.ca/Courses/Short-Courses/Audit-Committee-Effectiveness.aspx

Course: **NFP Program**
Start Date: March 25, 2019
Organizer: Institute of Corporate Directors and Rotman School of Management (U of
End Date: March 26, 2019
Location: Ottawa, Ontario, Canada
Alternative Date(s) & Location(s) November 21-22, 2018, Toronto ON
Feb. 11-12, 2019, Edmonton AB

Topic Area: Board Governance & Leadership
Attendance: Open To All

This program focuses on key accountabilities and responsibilities of leaders of not-for-profit (NFP) organizations through extensive use of team-based learning to ensure participants learn from both faculty and their peers.

Attend this program and gain the following benefits:
- Understand your fiduciary duty
- Learn best practices in governance
- Build group decision-making skills
- Apply change management principles to elevate board effectiveness

See the website for more information about the program.

Fees

$2,500 CAD + tax
Application deadline: January 28, 2019

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: http://www.icd.ca/Courses/NFP-Program.aspx

Course: **Advanced Principles of Pension Management for Trustees**
Start Date: March 27, 2019
Organizer: CALAPRS - In association with UCLA Anderson School of Business
End Date: March 29, 2019
Location: Los Angeles, California
Alternative Date(s) & Location(s) N/A

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 courses.

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

Fees

Not available. Please contact the conference organizer.
Registration opens Fall 2018.

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=1131364&group=

Course: **Audit Committee Effectiveness**
Organizer: Institute of Corporate Directors
Location: Vancouver, British Columbia, Canada
Start Date: March 28, 2019
End Date: March 28, 2019
Alternative Date(s) & Location(s) March 20, 2019, Toronto ON

Topic Area: Board Governance & Leadership
Attendance: Open To All

This course is designed to help directors be most effective on the audit committee and move beyond the traditional role of compliance oversight. Dig into topics from annual work plans to management and auditor relationships to emerging national and global issues, including:

- Evolving regulations impacting Audit Committees today
- Role of the Audit Committee Chair and his/her relationship with other board and management stakeholders
- Audit Committee's role in risk oversight and risk management
- Internal and external audit functions, including relationship dynamics with the external auditor
- Other key external relationships including regulators
- Non-standard issues faced by Audit Committees including whistleblowers, fraud, and material restatements

See website for more information about the program.

Fees

$1,395 CAD - for non-members
$1,050 CAD - for ICD members
$950 - for ICD directors
Application deadline: February 28, 2019

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: http://www.icd.ca/Courses/Short-Courses/Audit-Committee-Effectiveness.aspx

---

Course: **Private Equity: Investing and Creating Value**
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania
Start Date: April 08, 2019
End Date: April 12, 2019
Alternative Date(s) & Location(s) Oct. 29 - Nov 1, 2018, Philadelphia

Topic Area: Investments
Attendance: Open To All

This program is designed for institutional investors as well as investment professionals aspiring to be better private equity managers. It will deliver the latest information about the private equity sector, while teaching the latest concepts investors need to know to confidently evaluate investment opportunities in the private equity space and build optimal investment processes. During the program, participants will have an opportunity to focus on areas of individual interest, such as the limited partner perspective and private equity in emerging markets. Participants will learn the landscape of the private equity space and be exposed to concepts and tools that are used by private equity managers today.

See the website for more information about the program.

Fees

$10,950

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference: **Evolving Fiduciary Obligations of Institutional Investors**
Organizer: Institutional Investor - Co-hosted by Kessler Topaz Meltzer & Check LLP
Location: Chicago, Illinois
Start Date: April 30, 2019
End Date: May 01, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Corporate Governance
Attendance: By Invitation Only

This conference will offer a thorough overview of the landscape within which legal teams at both public plans and at asset management firms are operating to fulfill their obligations as fiduciaries and active shareholders. And in turn, how they may better leverage strategies and achieve objectives within this environment to meet both their individual as well as the community's shared objectives.

More information about the conference is not yet available.

Fees

Not yet available. Please contact the conference organizer.

Contact

Ann Cornish
Audience Director
Phone: (212) 224-3877
Fax: (212) 224-3802

Email

acornish@iiforums.com

Link: https://www.iiconferences.com/Institutional-Investor-Forums/Evolving-Fiduciary-Obligations-Institutional-Investors

Course: **Venture Capital**
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania
Start Date: May 06, 2019
End Date: May 10, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

This program will lift the veil on one of the most exciting and perhaps least transparent areas in finance. Designed for investors and entrepreneurs alike, participants will come away with a greater understanding of how venture capital (VC) works; how the best venture capitalists source, screen, and value deals; and how to design contracts that protect both investors and founders. It starts with a discussion on how VC funds are organized, how investments are selected, and how due diligence is conducted. Participants will examine case studies that detail a transaction from beginning to end. In this manner, participants will see how a deal is structured, learn more about the differing incentives of a VC fund and entrepreneurs, and gain a deeper understanding of venture investing.

See the website for more information about the program.

Fees

$10,950

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: https://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/venture-capital

Conference: **Spring Conference**
Organizer: State Association of County Retirement Systems (SACRS)
Location: Lake Tahoe, California
Start Date: May 07, 2019
End Date: May 10, 2019
Alternative Date(s) & Location(s) N/A

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.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

Phone: 916-441-1850
Fax: 916-441-6178

Email

sacrs@sacrs.org

Link: https://sacrs.org/events/spring-conference/

Conference: **Annual Conference**
Organizer: Public Retirement Information Systems Management (PRISM)
Location: Indianapolis, Indiana
Start Date: May 12, 2019
End Date: May 15, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Operations
Attendance: Members Only

The purpose of the PRISM organization is to provide a forum for IT management of public retirement funds to collaborate and share their experiences with new technologies affecting the retirement and IT industries.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

Please go to the website to contact the conference organizer.

Email

N/A

Link: https://prism-assoc.org/AboutUs/ConferenceInfo

Course: **Infrastructure in a Market Economy: Public-Private Partnerships**

Organizer: Harvard Kennedy School, Harvard University

Location: Cambridge, Massachusetts

Start Date: May 12, 2019

End Date: May 24, 2019

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

Topic Area: Investments

Attendance: Open To All

This course is designed to help senior decision-makers address critical questions about public-private partnerships in infrastructure. The program will show how collaboration between the two sectors can lead to successful outcomes. Bringing together senior-level officials from the public, corporate and nonprofit sectors, this intensive two-week program examines lessons learned and best practices from public-private infrastructure development projects around the world.

See the website for more information about the program.

Fees

$12,500
Application deadline: March 12, 2019

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

Link: https://www.hks.harvard.edu/educational-programs/executive-education/infrastructure-market-economy

---

Course: **NFP Program**

Organizer: Institute of Corporate Directors and Rotman School of Management

Location: Vancouver, British Columbia, Canada

Start Date: May 13, 2019

End Date: May 14, 2019

Alternative Date(s) & Location(s) November 21-22, 2018, Toronto ON
Feb. 11-12, 2019, Edmonton AB

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program focuses on key accountabilities and responsibilities of leaders of not-for-profit (NFP) organizations through extensive use of team-based learning to ensure participants learn from both faculty and their peers.

Attend this program and gain the following benefits:

- Understand your fiduciary duty
- Learn best practices in governance
- Build group decision-making skills
- Apply change management principles to elevate board effectiveness

See the website for more information about the program.

Fees

$2,500 CAD + tax
Application deadline: September 13, 2018

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: http://www.icd.ca/Courses/NFP-Program.aspx

Conference: **Trustee Education Seminar**
Start Date: May 18, 2019
Organizer: National Conference on Public Employee Retirement Systems
End Date: May 19, 2019
Location: Austin, Texas
Alternative Date(s) & Location(s) N/A

Topic Area: Board Governance & Leadership
Attendance: Members Only

This is a pre-conference program 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.

This two-day program provides an introduction to fiduciary responsibilities, creating a solid foundation of knowledge for those who have limited experience in pension plan trusteeship. Program content is designed to address the critical elements of trust fund management including, important topics such as investing, legal requirements and trustee ethics.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fee: $650
$200 discount for registration by April 20, 2018.

Contact

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

Email

registration@ncpers.org

Link: http://www.ncpers.org/teds

Conference: **Accredited Fiduciary (NAF) Program**
Start Date: May 18, 2019
Organizer: National Conference on Public Employee Retirement Systems
End Date: May 19, 2019
Location: Austin, Texas
Alternative Date(s) & Location(s) N/A

Topic Area: Board Governance & Leadership
Attendance: Members Only

This is an accreditation program specifically designed and tailored for 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.
Offered two modules at a time, upon completion of all four modules (in any order), participants will earn their Accredited Fiduciary (AF) designation.
It is recommended that participants complete the Trustee Educational Seminar first.
Module 1 – Governance and the Board's Role
Module 2 – Investment and Finance
Module 3 – Legal, Risk Management and Communication
Module 4 – Human Capital

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fee: $1,000 - for two modules
$200 discount for registration by April 20, 2018.

Contact

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

Email

registration@ncpers.org

Link: http://www.ncpers.org/naf

Conference: **Annual Conference and Exhibition**
Organizer: National Conference on Public Employee Retirement Systems
Location: New York, New York
Start Date: May 19, 2019
End Date: May 22, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: General
Attendance: Members Only

The NCPERS Annual Conference provides an opportunity to keep up-to-date on pension trends, best practices and the latest news and information pertinent to your fiduciary obligations.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fee: $1,000
$200 discount for registration by April 20, 2018.

Contact

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

Email

registration@ncpers.org

Link: http://www.ncpers.org/ace

Course: **Investment Strategies and Portfolio Management**
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania
Start Date: June 03, 2019
End Date: June 07, 2019
Alternative Date(s) & Location(s) Oct. 22-26, 2018, Philadelphia PA

Topic Area: Investments
Attendance: Open To All

This program provides a solid understanding of today's investment landscape and the tools and theories for developing and measuring the performance of portfolios. It explores individual asset classes, including bonds, hedge funds, private equity, derivatives, real estate, and international markets in sessions designed to help participants better understand when to include these investments in their portfolios. Industry experts offer real-world experience and expertise, helping participants understand how theories and frameworks can be put into practice. Session topics include:

- Modern Portfolio Theory
- Performance Measurement
- Evaluating Managers and Strategies
- Advanced Asset Allocation
- Investment Policy
- Outlook for the Economy and Navigating Its Risk

See the website for more information about the program.

Fees

$10,950

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

Course: **Value Investing**
Organizer: Columbia Business School
Location: New York, New York

Start Date: June 04, 2019
End Date: June 06, 2019
Alternative Date(s) & Location(s) December 4-6, 2018, New York, NY

Topic Area: Investments
Attendance: Open To All

Based on the Ben Graham or Warren Buffett approach to allocating capital, this exclusive program will teach the frameworks and processes of investing that some of the most successful investors in the world employ to manage and preserve capital.

You will learn to use quantitative valuation techniques, such as arbitrage, asset-based approaches and the earning power method, and you will effectively combine those tools with strategic methodologies for estimating franchise value. Three real-world case studies enable more precise estimation of investment risk and improve your ability to manage a value portfolio.

See the website for more information about the program.

Fees

$7,500

Contact

Liz N. Schultz
Senior Associate Director,
Learning Solutions
Phone: 212-854-7613

Email

Lns11@gsb.columbia.edu

Link: https://www8.gsb.columbia.edu/execed/program-pages/details/61/VI?sourceid=LeftNav

Conference: **Summer Roundtable**
Organizer: Pacific Pension Institute
Location: Chicago, Illinois

Start Date: July 10, 2019
End Date: July 12, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Risk Management
Attendance: Members Only

The Pacific Pension & Investment Institute (PPI) has held forums for over two decades that inform the investment decisions of the world's major institutional investors as they relate to Asia, the Pacific Rim, and the world. These forums, exclusively for members, are conducted in a collegial, trusted, and marketing-free environment, which allows in-depth and off-the-record dialogue.

More information about the conference is not yet available.

Fees

Not available.
Please contact the conference organizer.

Contact

Phone: +1 (415) 576-1187
Fax: +1 (415) 576-1189

Email

info@ppi.institute

Link: https://www.ppi.institute/programs/

Course: **Compensation Committees**
Organizer: Harvard Business School, Harvard University
Location: Cambridge, Massachusetts

Start Date: July 14, 2019
End Date: July 16, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Board Governance & Leadership
Attendance: Open To All

This program examines the characteristics of a well-functioning compensation committee and the close relationship among compensation plans, employee motivation, and long-term value creation. The program will help you determine how best to promote strategic success in your company through well-developed compensation and reward systems. These include not only designing better incentive schemes, but also understanding subjective and objective performance measurement systems, the role of culture, talent management, and succession planning. As a participant, you will learn how to adapt your compensation strategy's structure and process to better reflect market demands. It focuses on the design of compensation plans and the process that compensation committees should use to develop practices that link the rewards for executive performance to company goals.

See the website for more information about the program.

Fees

$6,700
Covers tuition, books, accommodation & most meals

Contact

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

Email

executive_education@hbs.edu

Link: http://www.exed.hbs.edu/programs/cc/Pages/default.aspx

Course: **Audit Committees in a New Era of Governance**
Organizer: Harvard Business School, Harvard University
Location: Cambridge, Massachusetts

Start Date: July 21, 2019
End Date: July 23, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Board Governance & Leadership
Attendance: Open To All

This program explores new ways that audit committees can fulfill their mandate and help their companies operate effectively in a more vacillating market environment. You will learn how to develop tools for ensuring effective risk management, including overseeing cybersecurity risk, improving financial reporting transparency and investor communication, encouraging the right risk culture and tone at the top of the company, and managing the latest developments in financial reporting. The program prepares audit committee chairs, board members, and chief financial officers to operate more effectively in today's more rigorous market environment. It is designed to help directors bring a strategic focus to the audit committee so that the company's growth and profit objectives are aligned with and supported by its financial reporting, compliance, and risk management functions.

See the website for more information about the program.

Fees

$6,700
Covers tuition, books, accommodation & most meals

Contact

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

Email

executive_education@hbs.edu

Link: http://www.exed.hbs.edu/programs/ac/Pages/default.aspx

Conference: **Annual Conference**
Organizer: National Association of State Retirement Administrators (NASRA)
Location: Williamsburg, Virginia

Start Date: August 03, 2019
End Date: August 07, 2019
Alternative Date(s) & Location(s) N/A

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 $4.2 trillion held in trust for 15 million working and 10 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.

More information about the conference is not yet available.

Fees

Not yet available

Contact

Mary Hiatte
Phone: 202.624.1418

Email

mary@nasra.org

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

Course: **Principles of Pension Management for Trustees**
Organizer: CALAPRS - In association with Pepperdine University
Location: Malibu, California

Start Date: August 26, 2019
End Date: August 29, 2019
Alternative Date(s) & Location(s) N/A

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 courses.

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

Fees

Not available. Please contact the conference organizer.
Registration opens Spring 2019.

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=1131365&group=

Terms and Conditions for use of the Cortex Report

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

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

Cortex Applied Research Inc.
2489 Bloor Street West, Unit 304
Toronto ON, M6S 1R6
Tel: (416) 967-0252 Fax: (416) 967-2711
e-mail: info@cortexconsulting.com