



The Cortex Report

Customized for the
San José Retirement Boards

January 2019

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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.

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Feb 28, 2019	Institute of Corporate Directors and Rotman School of Management (U of T)	Board Oversight of Strategy	Toronto	3	New
Mar 02, 2019	California Association of Public Retirement Systems (CALAPRS)	General Assembly	Monterey	4	
Mar 04, 2019	Council of Institutional Investors	Spring Conference	Washington	4	
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Mar 11, 2019	Institute of Corporate Directors and Rotman School of Management (U of T)	Board Oversight of Strategy	Winnipeg	5	New
Mar 14, 2019	Pension Real Estate Association (PREA)	PREA Spring Conference	Dallas	6	
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Apr 24, 2019	Institutional Investor	Public Funds Roundtable	Los Angeles	11	New
Apr 29, 2019	Wharton School, University of Pennsylvania - for the IFEBP	Advanced Investments Management	Philadelphia	12	New
Apr 30, 2019	Institutional Investor - Co-hosted by Kessler Topaz Meltzer & Check LLP	Evolving Fiduciary Obligations of Institutional Investors	Chicago	12	New
May 02, 2019	Pension Research Council, The Wharton School	Remaking Retirement? Debt in an Aging Economy	Philadelphia	13	New

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May 13, 2019	BCA Research - Approved by the CFA Institute	Global Asset Allocation	Toronto	15
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May 15, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Ottawa	16 <i>New</i>
May 18, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Trustee Education Seminar	Austin	17
May 19, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference and Exhibition	Austin	17
May 21, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Vancouver	18 <i>New</i>
May 23, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Calgary	18 <i>New</i>
Jun 02, 2019	International Centre for Pension Management (ICPM)	Discussion Forum	Vancouver	19
Jun 03, 2019	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia	19
Jun 06, 2019	The Conference Board	Leadership Development Conference	San Francisco	20 <i>New</i>
Jun 10, 2019	BCA Research - Approved by the CFA Institute	Geopolitics and Investing	Washington	20
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Jul 22, 2019	Wharton School, University of Pennsylvania - for the IFEBP	International and Emerging Market Investing	San Francisco	23 <i>New</i>
Jul 22, 2019	SACRS & Haas School of Business, UC Berkeley	Public Pension Investment Management Program	Berkeley	23
Jul 22, 2019	CFA Institute - Hosted by CFA Society Chicago	CFA Institute Seminar for Global Investors	Chicago	24 <i>New</i>
Aug 03, 2019	National Association of State Retirement Administrators (NASRA)	Annual Conference	Williamsburg	24
Aug 26, 2019	CALAPRS - In association with Pepperdine University	Principles of Pension Management for Trustees	Malibu	25
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Sep 16, 2019	Council of Institutional Investors	Fall Conference	Minneapolis	26	
Oct 13, 2019	National Council on Teacher Retirement (NCTR)	Annual Conference	Nashville	27	
Oct 16, 2019	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Washington	27	
Oct 19, 2019	National Pension Education Association (NPEA)	Annual Conference	Naples	28	New
Oct 20, 2019	Public Pension Financial Forum (P2F2)	Annual Conference	Salt Lake City	28	
Oct 21, 2019	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia	29	New
Oct 22, 2019	Mercer	Global Investment Forum	Boston	29	
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Oct 27, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Public Safety Conference	New Orleans	30	
Nov 04, 2019	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia	31	New
Nov 12, 2019	State Association of County Retirement Systems (SACRS)	Fall Conference	Monterey	31	New

Event Listings

The Cortex Report prepared for the San José Retirement Boards

Conference: Legislative Conference

Start Date: January 27, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: January 29, 2019

Location: Washington, District of Columbia

**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.

See the website for more information and a preliminary agenda.

Fees

\$500

Contact

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

Email

registration@ncpers.org

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

Conference: 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.

See the website for more information and a complete agenda.

Fees

No fee. 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/RiskAndLiquidity>

Course: Board Oversight of Strategy

Start Date: February 20, 2019

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

End Date: February 20, 2019

Location: Ottawa, Ontario, Canada

Alternative Date(s) & Location(s) February 28, 2019, Toronto ON
March 11, 2019, Winnipeg MB
April 17, 2019, Montreal PQ

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course will help directors successfully engage in the strategic oversight process. Developed in partnership with CPA Canada and based on CPA Canada's Overseeing Strategy: A Framework for Boards of Directors, participants will learn how to apply the four-phase framework, when to get involved and how to effectively participate in board oversight activities in different situations and business environments.

See the 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: January 23, 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: <https://www.icd.ca/Courses/Short-Courses/Board-Oversight-of-Strategy.aspx>

Conference: Global Real Assets Investment Forum

Start Date: February 26, 2019

Organizer: Institutional Investor

End Date: February 27, 2019

Location: Austin, Texas

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

Topic Area: Investments

Attendance: By Invitation Only

This conference will focus on the decisions North American pension funds and US endowments and foundations are making as they address the new global investment landscape and what this means for their portfolios of real assets. Agenda topics include:

- How will institutions forward-protect their portfolios in 2019?
- Is beta exposure your friend in real assets investing? It may be if/when you need liquidity
- How investor interest in the energy sector is changing where the money is flowing
- Is a public-private mix of real assets truly more resilient?
- ESG and real assets...
- Which real estate opportunities will withstand the downturn?
- How will anticipated changes in the distressed debt markets impact real assets investors
- Defining the governance structure which will facilitate co-investment programs
- Role of specialist v. generalist managers in infrastructure

See the website for more information and a complete agenda.

Fees

No fee. Registration limited to "senior investment executives" for real asset investments. 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/Global-Real-Assets-Investment-Forum>

Conference: Emerging Markets Forum

Start Date: February 26, 2019

Organizer: Institutional Investor

End Date: February 27, 2019

Location: Austin, Texas

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

Topic Area: Investments

Attendance: By Invitation Only

This conference will focus on how North American pension funds, endowments, and foundations are moving their emerging markets allocation significantly forward. Unlike a few years ago, most institutions are maintaining their strategic commitment to emerging markets assets and, instead, are focusing more on “dynamic discernment”.

More information about the conference is not yet available.

Fees

No fee. Registration limited to “qualified representatives” of institutional investors. 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/Emerging-Markets-Forum>

Course: Board Oversight of Strategy

Start Date: February 28, 2019

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

End Date: February 28, 2019

Location: Toronto, Ontario, Canada

**Alternative Date(s)
& Location(s)** February 20, 2019, Ottawa ON
March 11, 2019, Winnipeg MB
April 17, 2019, Montreal PQ

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course will help directors successfully engage in the strategic oversight process. Developed in partnership with CPA Canada and based on CPA Canada’s Overseeing Strategy: A Framework for Boards of Directors, participants will learn how to apply the four-phase framework, when to get involved and how to effectively participate in board oversight activities in different situations and business environments.

See the 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: January 31, 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: <https://www.icd.ca/Courses/Short-Courses/Board-Oversight-of-Strategy.aspx>

The Cortex Report prepared for the San José Retirement Boards

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: Spring Conference

Start Date: March 04, 2019

Organizer: Council of Institutional Investors

End Date: March 06, 2019

Location: Washington, District of Columbia

**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 corporate, public and union employee benefit funds and endowments with a focused policy mission: to be the leading voice for effective corporate governance practices for U.S. companies and strong shareowner rights and protections.

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.

More information about the conference is not yet available.

Fees

No charge for members. Prospective members should contact conference organizer to register.

Contact

Michael Miller
Phone: 202.822.0800

Email

michael@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=3/4/2019&eventid=29

Conference: Talent Management Strategies Conference

Start Date: March 05, 2019

Organizer: The Conference Board

End Date: March 06, 2019

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 “Innovative Talent Approaches for a Dynamic Market”. Participants will hear from leaders speaking on topics covering talent identification, acquisition, development and retention, as well as workforce planning.

See the website for more information and a preliminary agenda.

Fees

\$2,895 - non-members
\$2,295 - members
\$400 discount for registration by
December 22, 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=3022>

Course: Board Oversight of Strategy

Start Date: March 11, 2019

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

End Date: March 11, 2019

Location: Winnipeg, Manitoba, Canada

**Alternative Date(s)
& Location(s)** February 20, 2019, Ottawa ON
February 28, 2019, Toronto ON
April 17, 2019, Montreal PQ

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course will help directors successfully engage in the strategic oversight process. Developed in partnership with CPA Canada and based on CPA Canada’s Overseeing Strategy: A Framework for Boards of Directors, participants will learn how to apply the four-phase framework, when to get involved and how to effectively participate in board oversight activities in different situations and business environments.

See the 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
11, 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: <https://www.icd.ca/Courses/Short-Courses/Board-Oversight-of-Strategy.aspx>

Conference: PREA Spring Conference

Start Date: March 14, 2019

Organizer: Pension Real Estate Association (PREA)

End Date: March 15, 2019

Location: Dallas, Texas

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

Conference: Fixed Income & Credit

Start Date: March 19, 2019

Organizer: Pensions & Investments

End Date: March 19, 2019

Location: Dallas, Texas

**Alternative Date(s)
& Location(s)** March 21, 2019, New York NY

Topic Area: Investments

Attendance: By Invitation Only

This conference will explore how institutions are shifting their fixed income allocations in the search for superior outcomes, while also examining the risks and opportunities presented by different sectors and strategies.

More information about the conference is not yet available.

Fees

Not yet available.
Please contact conference organizer.

Contact

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

Email

pi-registration@pionline.com

Link: http://www.pionline.com/conferences?event_type=conference

Course: Audit Committee Effectiveness

Start Date: March 20, 2019

Organizer: Institute of Corporate Directors

End Date: March 20, 2019

Location: Toronto, Ontario, Canada

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.

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>

Conference: Fixed Income & Credit

Start Date: March 21, 2019

Organizer: Pensions & Investments

End Date: March 21, 2019

Location: New York, New York

Alternative Date(s) & Location(s) March 19, 2019, Dallas TX

Topic Area: Investments

Attendance: By Invitation Only

This conference will explore how institutions are shifting their fixed income allocations in the search for superior outcomes, while also examining the risks and opportunities presented by different sectors and strategies.

More information about the conference is not yet available.

Fees

Not yet available.
Please contact conference organizer.

Contact

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

Email

pi-registration@pionline.com

Link: http://www.pionline.com/conferences?event_type=conference

The Cortex Report prepared for the San José Retirement Boards

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.

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	Start Date: March 28, 2019
Organizer: Institute of Corporate Directors	End Date: March 28, 2019
Location: Vancouver, British Columbia, Canada	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.

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>

The Cortex Report prepared for the San José Retirement Boards

Course: Private Equity: Investing and Creating Value

Start Date: April 08, 2019

Organizer: The Wharton School, University of Pennsylvania

End Date: April 12, 2019

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Nov. 4-8, 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. 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: The Pension Bridge Annual

Start Date: April 09, 2019

Organizer: The Pension Bridge

End Date: April 10, 2019

Location: San Francisco, California

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

Topic Area: Investments

Attendance: Open To All

The Pension Bridge Inc. is a company offering educational conferences to the institutional investment community. Its objective is to provide the highest level of education in a setting that is conducive to networking. It helps institutional money managers connect with pension funds across the country. The events can act as a stepping stone to a successful financial relationship or simply help build the education that is instrumental to the investment decision making process.

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

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 561-455-2729

Fax: 561-258-8258

Email

info@pensionbridge.com

Link: <http://www.pensionbridge.com/agendaannual2019.asp>

Conference: Leadership Development Conference

Start Date: April 09, 2019

Organizer: The Conference Board

End Date: April 10, 2019

Location: New York, New York

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

Topic Area: Human Resources

Attendance: Open To All

The theme of this conference is Leadership, Culture and Context Matter: Building Capability Throughout the Pipeline. Key takeaways include:

- Understand the impact of a changing workforce on leadership agility and capacity
- Explore practices that innovate in “high-touch” and “high-tech” solutions
- Optimize the alignment a People Strategy with overall HR and Business Strategies
- Gain insights from researchers and practitioners to strengthen your leadership development strategy
- Network with colleagues from across the globe and discuss common challenges and solutions.

See website for more information about the conference.

Fees

\$2,895 - non-members
\$2,295 - members
\$400 discount for registration by
January 26, 2019

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=3023>

Course: Board Oversight of Strategy

Start Date: April 17, 2019

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

End Date: April 17, 2019

Location: Montreal, Quebec, Canada

**Alternative Date(s)
& Location(s)** February 20, 2019, Ottawa ON
February 28, 2019, Toronto ON
March 11, 2019, Winnipeg MB

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course will help directors successfully engage in the strategic oversight process. Developed in partnership with CPA Canada and based on CPA Canada’s Overseeing Strategy: A Framework for Boards of Directors, participants will learn how to apply the four-phase framework, when to get involved and how to effectively participate in board oversight activities in different situations and business environments.

See the 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: March 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: <https://www.icd.ca/Courses/Short-Courses/Board-Oversight-of-Strategy.aspx>

Conference: Private Equity Summit - West Coast

Start Date: April 23, 2019

Organizer: Institutional Investor

End Date: April 23, 2019

Location: Los Angeles, California

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

Topic Area: Investments

Attendance: By Invitation Only

Today, the private equity industry manages over \$3 trillion of capital and the amount of dry powder has surpassed \$1 trillion. In order to generate growth and maintain returns on the capital pouring into the industry, GPs must enhance their capabilities and develop new strategies. Or change the terms of their relationships with LPs.

At this summit, GPs and LPs will meet to compare notes on the current investment opportunity set in private equity and debt. What are GPs and LPs doing to enhance their respective investment processes and improve investment outcomes? Will LP appetite for niche strategies remain strong going into 2019?

See the website for more information about the conference.

Fees

Not yet available. Please contact the conference organizer.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Private-Equity-Summit-West-Coast>

Conference: Public Funds Roundtable

Start Date: April 24, 2019

Organizer: Institutional Investor

End Date: April 26, 2019

Location: Los Angeles, California

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

Topic Area: Investments

Attendance: By Invitation Only

More information about the Roundtable is not yet available.

Fees

Not yet available.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Conferences/Public-Funds-Roundtable>

Course: Advanced Investments Management

Start Date: April 29, 2019

Organizer: Wharton School, University of Pennsylvania - for the IFEBP

End Date: May 02, 2019

Location: Philadelphia, Pennsylvania

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

Topic Area: Investments

Attendance: Open To All

This program is designed to build upon what is learned in the Portfolio Concepts and Management program or participants' existing knowledge base and experience. The program is for individuals who have a solid grasp of investment management fundamentals and seek to learn more. Topics include:

- Introduction and Performance Analysis
- Advanced Bond Management
- Advanced Asset Allocation
- Evaluation of Managers
- Real Estate in a Pension Fund Portfolio
- Alternative Investments: A Discussion and Overview of Hedge Funds
- International Investing
- Pension Fund Valuation in the New World of Risk
- Investment Policy

See website for more information about the program.

Fees

\$6,235 - non-members
\$5,795 - IFEBP members
\$300 discount for registration by March 17, 2019

Contact

Phone: (888) 334-3327

Email

edreg@ifebp.org

Link: <http://www.ifebp.org/education/certificateprograms/wharton/Pages/advanced-investments-management-1963.aspx#additional-information>

Conference: Evolving Fiduciary Obligations of Institutional Investors

Start Date: April 30, 2019

Organizer: Institutional Investor - Co-hosted by Kessler Topaz Meltzer & Check LLP

End Date: May 01, 2019

Location: Chicago, Illinois

**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>

Conference: Remaking Retirement? Debt in an Aging Economy

Start Date: May 02, 2019

Organizer: Pension Research Council, The Wharton School

End Date: May 03, 2019

Location: Philadelphia, Pennsylvania

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

Topic Area: Pension Plan Policy

Attendance: Members Only

This symposium explores changing patterns of debt as the world ages and what these patterns will imply for retirement security. Implications for plan sponsors, benefits specialists, actuaries, academics, regulators, and plan participants will be drawn out in terms of saving, investment, consumption, and housing expenditures.

The symposium is for members only and by invitation. Please visit the website and log in for more information.

Fees

Not available. Please contact conference organizer.

Contact

Phone: 215.898.7620
Fax: 215.573.3418

Email

prc@wharton.upenn.edu

Link: <https://pensionresearchcouncil.wharton.upenn.edu/conferences/>

Course: Venture Capital

Start Date: May 06, 2019

Organizer: The Wharton School, University of Pennsylvania

End Date: May 10, 2019

Location: Philadelphia, Pennsylvania

**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>

The Cortex Report prepared for the San José Retirement Boards

Conference: Spring Conference

Start Date: May 07, 2019

Organizer: State Association of County Retirement Systems (SACRS)

End Date: May 10, 2019

Location: Lake Tahoe, California

**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

Start Date: May 12, 2019

Organizer: Public Retirement Information Systems Management (PRISM)

End Date: May 15, 2019

Location: Indianapolis, Indiana

**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: Human Resources & Compensation Committee Effectiveness

Start Date: May 13, 2019

Organizer: Institute of Corporate Directors

End Date: May 13, 2019

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) May 15, 2019, Ottawa ON
May 21, 2019, Vancouver BC
May 23, 2019, Calgary AB

Topic Area: Human Resources

Attendance: Open To All

This course was created to help directors develop deeper insights into issues such as CEO succession planning, executive compensation and incentive plans, human capital development beyond the CEO, and dealing with increased scrutiny of executive compensation plans by activist shareholders and proxy advisors.

See the 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: April 15, 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/HR-Compensation-Committee-Effectiveness.aspx>

Course: Global Asset Allocation

Start Date: May 13, 2019

Organizer: BCA Research - Approved by the CFA Institute

End Date: May 13, 2019

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) April 1, 2019, London, UK

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 clear and thought-provoking research. This course will help you:

- Learn methods and strategies to harvest alpha from these macro inefficiencies.
- Identify portfolio objectives as a starting point for successful asset allocation strategies.
- Match the macro environment with the appropriate asset allocation strategies - often the most challenging part of the investment process.
- Become more effective at interpreting how BCA's Global Asset Allocation team sees the world; an important input given the increasingly complex macro environment.
- Gain a better understanding of how to develop and execute asset allocation strategies, and how investors should be positioned given prevailing market conditions.

See the website for more information about the program.

Fees

\$2,500

Contact

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

Email

academy@bcaresearch.com

Link: <https://interactive.bcaresearch.com/academy/global-asset-allocation-719PC-4675OK.html?>

Conference: Spring Conference

Start Date: May 14, 2019

Organizer: Journal of Investment Management - Approved by the CFA Institute

End Date: May 15, 2019

Location: New York, New York

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

Topic Area: Investments

Attendance: Members Only

This conference is titled Retirement Investing: The State of the Art Part I. The latest and emerging strategies and techniques of retirement investing will be explored. This will highlight developments in such areas as Goal Investing, Robo Investing, and the potential of Big Data and Artificial Intelligence (AI) as a basis for cutting edge approaches to Retirement Investing. Both the academic and practitioner perspectives will be covered.

This event is co-sponsored with NYU Stern School of Business and BlackRock. More information about the conference is not yet available.

Fees

\$3,000 - non-member (guest)
\$5,000 - annual membership
(includes Spring & Fall Conferences)

Contact

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

Email

customerservice@joim.com

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

Course: Human Resources & Compensation Committee Effectiveness

Start Date: May 15, 2019

Organizer: Institute of Corporate Directors

End Date: May 15, 2019

Location: Ottawa, Ontario, Canada

**Alternative Date(s)
& Location(s)** May 13, 2019, Toronto ON
May 21, 2019, Vancouver BC
May 23, 2019, Calgary AB

Topic Area: Human Resources

Attendance: Open To All

This course was created to help directors develop deeper insights into issues such as CEO succession planning, executive compensation and incentive plans, human capital development beyond the CEO, and dealing with increased scrutiny of executive compensation plans by activist shareholders and proxy advisors.

See the 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: April 17, 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/HR-Compensation-Committee-Effectiveness.aspx>

The Cortex Report prepared for the San José Retirement Boards

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

Contact

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

Email

registration@ncpers.org

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

Conference: Annual Conference and Exhibition

Start Date: May 19, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 22, 2019

Location: Austin, Texas

**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 than 1,000 trustees, administrators, state and local officials, investment, financial and union officers, pension staff and regulators attend each year.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fee: \$1,000

Contact

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

Email

registration@ncpers.org

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

Course: Human Resources & Compensation Committee Effectiveness

Start Date: May 21, 2019

Organizer: Institute of Corporate Directors

End Date: May 21, 2019

Location: Vancouver, British Columbia, Canada

Alternative Date(s) May 13, 2019, Toronto ON

& Location(s) May 15, 2019, Ottawa ON

May 23, 2019, Calgary AB

Topic Area: Human Resources

Attendance: Open To All

This course was created to help directors develop deeper insights into issues such as CEO succession planning, executive compensation and incentive plans, human capital development beyond the CEO, and dealing with increased scrutiny of executive compensation plans by activist shareholders and proxy advisors.

See the 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: April 23, 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/HR-Compensation-Committee-Effectiveness.aspx>

Course: Human Resources & Compensation Committee Effectiveness

Start Date: May 23, 2019

Organizer: Institute of Corporate Directors

End Date: May 23, 2019

Location: Calgary, Alberta, Canada

Alternative Date(s) May 13, 2019, Toronto ON

& Location(s) May 15, 2019, Ottawa ON

May 21, 2019, Vancouver BC

Topic Area: Human Resources

Attendance: Open To All

This course was created to help directors develop deeper insights into issues such as CEO succession planning, executive compensation and incentive plans, human capital development beyond the CEO, and dealing with increased scrutiny of executive compensation plans by activist shareholders and proxy advisors.

See the 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: April 25, 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/HR-Compensation-Committee-Effectiveness.aspx>

Conference: Discussion Forum

Start Date: June 02, 2019

Organizer: International Centre for Pension Management (ICPM)

End Date: June 04, 2019

Location: Vancouver, Ontario, Canada

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

Topic Area: General

Attendance: By Invitation Only

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

More information about the Forum is not yet available.

Fees

Not available. Please contact the conference organizer.

Contact

Karen Clarke
Phone: 416.925.4153
Fax: 416.925.7377

Email

kclarke@icpmnetwork.com

Link: <http://icpmnetwork.com/icpm-events/discussion-forums/>

Course: Investment Strategies and Portfolio Management

Start Date: June 03, 2019

Organizer: The Wharton School, University of Pennsylvania

End Date: June 07, 2019

Location: Philadelphia, Pennsylvania

**Alternative Date(s)
& Location(s)** October 21-25, 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 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>

The Cortex Report prepared for the San José Retirement Boards

Conference: Leadership Development Conference

Start Date: June 06, 2019

Organizer: The Conference Board

End Date: June 07, 2019

Location: San Francisco, California

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

Topic Area: Human Resources

Attendance: Open To All

The theme of this conference is Leadership, Culture and Context Matter: Building Capability Throughout the Pipeline. Key takeaways include:

- Understand the impact of a changing workforce on leadership agility and capacity
- Explore practices that innovate in “high-touch” and “high-tech” solutions
- Optimize the alignment a People Strategy with overall HR and Business Strategies
- Gain insights from researchers and practitioners to strengthen your leadership development strategy
- Network with colleagues from across the globe and discuss common challenges and solutions.

See website for more information about the conference.

Fees

\$2,895 - non-members
\$2,295 - members
\$400 discount for registration by March 30, 2019

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=3026>

Course: Geopolitics and Investing

Start Date: June 10, 2019

Organizer: BCA Research - Approved by the CFA Institute

End Date: June 10, 2019

Location: Washington, District of Columbia

**Alternative Date(s)
& Location(s)** April 2, 2019, London, UK

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 clear and thought-provoking research.

This course combines seventy years of macroeconomic research with geopolitical risk analysis. BCA's analytical framework regards geopolitics as either a risk or an opportunity, recognizing the need to preserve capital and/or seek profits as events are mispriced in the market. The course focuses on the geopolitical and macroeconomic realities that constrain policymakers' options, zeroing in on the investment implications and consequences of their decisions. You'll develop an understanding of how geopolitical risk should be measured, how politics can impact investment returns, and what primary geopolitical and political trends will influence economic growth and market dynamics.

See the website for more information about the program.

Fees

\$2,500

Contact

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

Email

academy@bcaresearch.com

Link: <https://interactive.bcaresearch.com/academy/geopolitics-and-investing-719PC-4676QU.html?>

Conference: Chief Officers Summit

Start Date: June 12, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: June 14, 2019

Location: Chicago, Illinois

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

Topic Area: Board Governance & Leadership

Attendance: Members Only

The CO Summit is the culmination of extensive research and engagement with NCPERS' membership and builds upon the successful launch of the CIO Summit in 2018. NCPERS interviewed over 40 public pension plans, and conducted a membership-wide survey on the needs of public pension staff. A consistent theme from this field research was a desire and need of CIOs and CEOs—particularly in mid-market plans—to learn, network, and share with their peers. A few unique features of the CO Summit are:

- Dual tracks: one exclusively for public pension CIOs and another exclusively for CEOs.
- Attendees are chief officers from funds with assets between \$2 billion and \$60 billion.
- The CIO Summit agenda will be developed by peer, mid-market CIOs.
- The CEO Summit agenda will be developed by peer, mid-market CEOs.
- Solutions-focused group discussions after each general session.
- Limited attendees to promote active participation and discussion.
- Both CIO and CEO tracks will be closed to marketers from the vendor community.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

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

Email

registration@ncpers.org

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

Course: Board Risk Oversight and Insight Program

Start Date: June 19, 2019

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

End Date: June 20, 2019

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
Fax: +1 (416) 306-1450

Email

mmontes@globalriskinstitute.org

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

Conference: Summer Roundtable

Start Date: July 10, 2019

Organizer: Pacific Pension Institute

End Date: July 12, 2019

Location: Chicago, Illinois

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

Topic Area: Risk Management

Attendance: Members Only

Pacific Pension & Investment Institute (PPI) roundtables provide members a unique opportunity to explore issues related to long-term investment. Limited to roughly 120 senior executives from the institutional investor community, these programs offer a forum for honest and confidential discussions on important themes and trends that affect asset allocation, risk management, and investment decisions

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/>

Conference: Trustee Workshop

Start Date: July 21, 2019

Organizer: National Council on Teacher Retirement (NCTR)

End Date: July 24, 2019

Location: Berkeley, California

**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.

This workshop is presented in affiliation with the UC Berkeley Center for Executive Education at the Haas School of Business. It is developed with input from board trustees on the NCTR Trustee Education Committee and is designed by and for public pension board trustees. Workshop agenda items offer a wide range of educational content for both new and experienced trustees.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fee: \$2,400

Contact

Robyn Wheeler
Phone: (916) 509-7260

Email

rwheeler@nctr.org

Link: <https://nctr.org/upcoming-events/workshops-2/>

Course: International and Emerging Market Investing

Start Date: July 22, 2019

Organizer: Wharton School, University of Pennsylvania - for the IFEBP

End Date: July 24, 2019

Location: San Francisco, California

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

Topic Area: Investments

Attendance: Open To All

This program is designed to provide insight into the global marketplace to those who already have a solid grasp on basic investment topics. Discover investment opportunities and risks of international and emerging countries and how to navigate these risks.

- Globalization and Global Economic Markets
- Emerging Markets: Opportunities and Risks
- Emerging Markets: A Financial Force
- Mechanics of International Diversification
- Developed Market Equities
- Emerging Market Equity
- Global Bonds and Exchange Rates
- Foreign Investment Vehicles—Funds, MNCs, ADRs and Exchange Traded Funds (ETFs)

See the website for more information about the program.

Fees

\$4,785 - non-members
\$4,455 - members
\$300 discount for registration by
June 10, 2019

Contact

Phone: (262) 786-6710
Toll-free: (888) 334-3327

Email

edreg@ifebp.org

Link: <http://www.ifebp.org/education/certificateprograms/wharton/Pages/international-and-emerging-market-investing-19h6.aspx>

Course: Public Pension Investment Management Program

Start Date: July 22, 2019

Organizer: SACRS & Haas School of Business, UC Berkeley

End Date: July 24, 2019

Location: Berkeley, California

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

Topic Area: Investments

Attendance: Members Only

This course, Modern Investment Theory & Practice for Retirement Systems, is a four-day course offering SACRS' members in-depth knowledge on today's successful investment models and strategies. They will learn how to practically integrate these methods immediately into their own plan administration, advancing their skills and elevating the collective expertise of SACRS' membership. Completion of the course earns them a certificate of achievement from UC Berkeley.

This program is widely popular and limited to 30-40 people. System members have registration priority. See the website for more information about the program.

Fees

\$2,500

Contact

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

Email

sacrs@sacrs.org

Link: <https://sacrs.org/events/sacrs-uc-berkeley-program/>

Course: CFA Institute Seminar for Global Investors

Start Date: July 22, 2019

Organizer: CFA Institute - Hosted by CFA Society Chicago

End Date: July 25, 2019

Location: Chicago, Illinois

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

Topic Area: Investments

Attendance: Open To All

This seminar, held each year at the University of Chicago Booth School of Business, gathers a faculty of leading investors and researchers to provide their insights, perspectives, and practical takeaways to a global audience of asset managers and asset owners. An array of investment topics include the following:

- Effects of global macroeconomic trends, geopolitics, and policy on investments
- Improving data analysis and the application of new technologies in traditional and quantitative portfolio management
- Development and allocation of a range of investment strategies, asset classes, and risks.

More information about the seminar is not yet available.

Fees

Not yet available.

Contact

Phone: +1-434-951-5499

Fax: +1 (434) 951-5262

Toll-free: 1-800-247-8132

Email

programs@cfainstitute.org

Link: <https://www.cfainstitute.org/en/events/conferences/seminar-for-global-investors>

Conference: Annual Conference

Start Date: August 03, 2019

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: August 07, 2019

Location: Williamsburg, Virginia

**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>

The Cortex Report prepared for the San José Retirement Boards

Course: Principles of Pension Management for Trustees

Start Date: August 26, 2019

Organizer: CALAPRS - In association with Pepperdine University

End Date: August 29, 2019

Location: Malibu, 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 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=>

Conference: Fall Conference

Start Date: September 08, 2019

Organizer: Journal of Investment Management - Approved by the CFA Institute

End Date: September 10, 2019

Location: Cambridge, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

This conference is titled Retirement Investing: The State of the Art Part II. The line-up of presentations will include the Keynote address by Robert Merton of the Sloan School of MIT and Nobel Laureate in Economic Sciences and Zvi Bodie, Bodie Associates.

This event is co-sponsored with the MIT Sloan Finance Group and Golub Center for Finance and Policy

More information about the conference is not yet available.

Fees

\$3,000 - non-member (guest)
\$5,000 - annual membership
(includes Spring & Fall
Conferences)

Contact

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

Email

customerservice@joim.com

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

Conference: Public Pension Funding Forum

Start Date: September 11, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: September 13, 2019

Location: New York, New York

**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.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fees: \$750

Contact

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

Email

registration@ncpers.org

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

Conference: Fall Conference

Start Date: September 16, 2019

Organizer: Council of Institutional Investors

End Date: September 18, 2019

Location: Minneapolis, Minnesota

**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.

More information about the conference is not yet available.

Fees

No charge for members.
Prospective members should contact conference organizer.

Contact

Michael Miller
Phone: 202.822.0800

Email

michael@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=9/18/2019&eventid=30

Conference: Annual Conference

Start Date: October 13, 2019

Organizer: National Council on Teacher Retirement (NCTR)

End Date: October 15, 2019

Location: Nashville, Tennessee

**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.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fees: \$1,400

Contact

Robyn Wheeler
Phone: (916) 509-7260

Email

rwheeler@nctr.org

Link: <https://nctr.org/conference/>

Conference: Annual Institutional Investor Real Estate Conference

Start Date: October 16, 2019

Organizer: Pension Real Estate Association (PREA)

End Date: October 18, 2019

Location: Washington, District of Columbia

**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 yet available.
Last year's fees:
\$415 - non-member
\$110 - member

Contact

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

Email

amy@prea.org

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

Conference: Annual Conference

Start Date: October 19, 2019

Organizer: National Pension Education Association (NPEA)

End Date: October 23, 2019

Location: Naples, Florida

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

Topic Area: Pension Plan Policy

Attendance: Members Only

The NPEA is a national organization of public retirement systems that focuses on comprehensive retirement education for members of these systems. It provides a forum to educate public retirement system professionals and encourage the ongoing exchange of information and ideas in retirement planning and member communication. NPEA's goal is to assist public retirement system professionals with resources to anticipate the needs of their members as they plan a retirement that is emotionally, financially and socially satisfying.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fee: \$750

Contact

Aimee Rives, Administrator
Phone: 859-492-1693

Email

aimee.rives@gmail.com

Link: <http://npea.com/2019-annual-conference>

Conference: Annual Conference

Start Date: October 20, 2019

Organizer: Public Pension Financial Forum (P2F2)

End Date: October 23, 2019

Location: Salt Lake City, Utah

**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. To support the ongoing education of its membership, it prepares quarterly newsletters, holds member facilitated conference calls and hosts an annual conference at a North American location.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fees: \$500

Contact

Phone: 614-227-0059

Email

information@p2f2.org

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

Course: Investment Strategies and Portfolio Management

Start Date: October 21, 2019

Organizer: The Wharton School, University of Pennsylvania

End Date: October 25, 2019

Location: Philadelphia, Pennsylvania

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 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>

Conference: Global Investment Forum

Start Date: October 22, 2019

Organizer: Mercer

End Date: October 23, 2019

Location: Boston, Massachusetts

Alternative Date(s) & Location(s) April 16, 2019, Tokyo, Japan
June 20-21, 2019, Toronto ON
Sept. 3-4, 2019, Dublin, Ireland

Topic Area: Investments

Attendance: By Invitation Only

Mercer Global Investment Forums provide the setting for stimulating and informative discussions on the economy, institutional investments, pension plan management, and more. Over the years, we've had hundreds of institutional investors, asset and fund managers, and Mercer investment professionals come together to connect, learn, and share.

More information about the forums is not yet available.

Fees

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

Contact

Allison (Grasso) Vitale

Phone: +1 201 744 1758

Email

allison.grasso@mercer.com

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

Conference: Accredited Fiduciary (NAF) Program

Start Date: October 26, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 27, 2019

Location: New Orleans, Louisiana

**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 fees: \$1,000 - for two modules

Contact

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

Email

registration@ncpers.org

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

Conference: Public Safety Conference

Start Date: October 27, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 30, 2019

Location: New Orleans, Louisiana

**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.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fees: \$800

Contact

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

Email

registration@ncpers.org

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

Course: Private Equity: Investing and Creating Value

Start Date: November 04, 2019

Organizer: The Wharton School, University of Pennsylvania

End Date: November 08, 2019

Location: Philadelphia, Pennsylvania

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. 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: Fall Conference

Start Date: November 12, 2019

Organizer: State Association of County Retirement Systems (SACRS)

End Date: November 15, 2019

Location: Monterey, California

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.

Last year's fees:

\$120 - system member and

other non-profit member

\$2,670 - non-member

Contact

Phone: 916-441-1850

Fax: 916-441-6178

Email

sacrs@sacrs.org

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

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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