



# ***The Cortex Report***

**Customized for the**

**San José Retirement Boards**

**March 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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May 21, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Vancouver	17
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May 28, 2019	Institute of Corporate Directors and Rotman School of Management (U of T)	NFP Program	Toronto	18 <i>New</i>
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Jun 06, 2019	The Conference Board	Leadership Development Conference	San Francisco	20
Jun 10, 2019	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia	20
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Oct 26, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	New Orleans	33	
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Nov 14, 2019	Pensions & Investments	Multi-Asset Investing	New York	36	New
Nov 14, 2019	CFA Institute - Hosted with the CFA Society New York	Equity Research and Valuation	New York	37	New
Dec 08, 2019	The Wharton School, University of Pennsylvania	Venture Capital	San Francisco	37	New
Jan 26, 2020	National Conference on Public Employee Retirement Systems (NCPERS)	Legislative Conference	Washington	38	New

## ***Event Listings***



## *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. Key topics at this conference include:

- Blockchain and Securities Trading
- Engaging in Market Policy Reform to Enhance Long-Term Performance
- Fixed Income and Corporate Governance
- Assessing the Long-term Risk for Investors in Public Utilities and Renewables
- Corporate Governance in Emerging Markets: What Matters Most?
- Understanding the ESG Risk at Large Technology Companies
- Drivers of EM Capital Flows | Global Governance Developments
- Investor Sentiment on Executive Pay Design

See the website for more information about the conference.

**Fees**

No charge for members.  
Please contact the conference organizer to become a member and register.

**Contact**

Kylund Arnold  
Phone: 202.822.0800

**Email**

kylund@cii.org

**Link:** [https://www.cii.org/ev\\_calendar\\_day.asp?date=3/4/2019&eventid=29](https://www.cii.org/ev_calendar_day.asp?date=3/4/2019&eventid=29)

## *The Cortex Report prepared for the San José Retirement Boards*

**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 “Managing and Developing Talent in an Unprecedented, Super Competitive Market”. It will bring together leading practitioners in talent identification, acquisition, development, and retention, as well as workforce planning. You will learn about current best practices from top companies, discover “what’s next” in the field of talent management, and find out what prominent leaders are doing to prepare for the future.

See the website for more information about the conference.

**Fees**

\$2,895 - non-members  
\$2,395 - 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=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)** April 8, 2019, Saskatoon SK  
April 17, 2019, Montreal PQ  
June 21, 2019, Halifax NS

**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

**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.

See the website for more information about the conference.

**Fees**

\$525 - non-member  
\$150 - member

**Contact**

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

**Email**

amy@prea.org

**Link:** <http://spring2019.prea.org/>

**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.

See the website for more information about the conference.

**Fees**

Not yet available.  
Please contact conference organizer.

**Contact**

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

**Email**

pi-registration@pionline.com

**Link:** <https://conferences.pionline.com/conference/fixed-income/2019/>

## *The Cortex Report prepared for the San José Retirement Boards*

**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

**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:** <https://conferences.pionline.com/conference/fixed-income/2019/>

## *The Cortex Report prepared for the San José Retirement Boards*

**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)** April 1-2, 2019, Winnipeg MB  
May 13-14, 2019, Vancouver BC  
May 28-29, 2019, Toronto 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: 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.

**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

**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:** April 01, 2019

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

**End Date:** April 02, 2019

**Location:** Winnipeg, Manitoba, Canada

**Alternative Date(s) & Location(s)** March 25-26, 2019, Ottawa ON  
May 13-14, 2019, Vancouver BC  
May 28-29, 2019, Toronto 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: March 8, 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:** 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 concepts investors need to know to evaluate investment opportunities in the private equity space. Session topics include:

- Fund Structure
- Leveraged Buyout Model and Comparables Analysis
- Deal Origination, Transaction, and Execution
- Value Creation With Operations and Negotiation
- Advanced And Best Practices In Private Equity
- Commercial Due Diligence
- The Limited Partners' Perspective
- Growth Equity
- Middle Market Private Equity
- Private Equity In Emerging Economies

See the website for more information about the program.

**Fees**

\$10,950

Fee includes lodging and meals.

**Contact**

Phone: 215.898.1776

Toll-free: 1.800.255.3932

**Email**

execed@wharton.upenn.edu

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

**Course:** Board Oversight of Strategy

**Start Date:** April 08, 2019

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

**End Date:** April 08, 2019

**Location:** Saskatoon, Saskatchewan, Canada

**Alternative Date(s) & Location(s)** March 11, 2019, Winnipeg MB  
April 17, 2019, Montreal PQ  
June 21, 2019, Halifax NS

**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 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:** 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)** June 6-7, 2019, San Diego CA

**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  
\$2,395 - 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=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)** March 11, 2019, Winnipeg MB  
April 8, 2019, Saskatoon SK  
June 21, 2019, Halifax NS

**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

This summit will examine 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? Topics include:

- The Outlook for Returns: Do LPs Remain Enthusiastic about Private Equity?
- The Utility of the Secondary Market: New Purpose and Strategies
- Sustainable Models for Co-Investment: Lessons from Small and Large LPs
- The US and Beyond: Sourcing Opportunities in the Small to Middle Market
- Accessing the Technology Growth Story in China
- Why LPs Still Find Healthcare Investments Attractive in Private Equity
- Using the Private Equity Model in Non-Traditional Sectors
- Private Debt – Finding Esoteric Opportunities
- The Effect of China Companies on the VC/PE Market

See the website for more information about the conference.

**Fees**

Not 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**

**Organizer:** Institutional Investor

**Location:** Los Angeles, California

**Start Date:** April 24, 2019

**End Date:** April 26, 2019

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

**Topic Area:** Investments

**Attendance:** By Invitation Only

The current environment is one of high anxiety – socially and in many cases economically. This roundtable will address various topics including the following:

- Public Funds: Culture & Compensation
- Is It Time to Take Equity Exposure off the Table – And If You So, Where Do You Put it?
- Fear and Loathing in Private Credit
- Brave New Energy Sector
- Real Estate Masterclass
- The Reality of the Private Equity Secondaries Market
- Strategic Partnerships: American and Canadian Approaches
- Emerging Markets Down For the Count
- ESG and The Investment Process
- Challenging Asset Allocation Wisdom

See the website for more information about the conference.

**Fees**

Not available. Registration limited to "investment executives" from pension funds. 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-Conferences/Public-Funds-Roundtable>

**Course: Refresher Workshop in Core Investment Concepts**

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

**Location:** Philadelphia, Pennsylvania

**Start Date:** April 28, 2019

**End Date:** April 28, 2019

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

**Topic Area:** Investments

**Attendance:** Open To All

This program is designed for those who plan to register for the Advanced Investments Management program. If it has been some time since you have participated in investment-related coursework, you may want to also register for the refresher workshop which will review terms and concepts related to portfolio theory and management in order to maximize your experience in the advanced program. Topics include:

- Basic principles of portfolio theory
- How bonds and stocks are evaluated
- Basic benchmarks used for measuring fund performance
- Benefits of global diversification
- Styles of management used by fund managers for achieving investment objectives
- Types of real estate investments
- Alternative investments
- The efficient market principle

See website for more information about the program.

**Fees**

\$565 - non-members  
\$455 - IFEBP members  
Fee applicable through 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>

**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 18, 2019

**Contact**

Phone: (888) 334-3327

**Email**

edreg@ifebp.org

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

**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/>

## *The Cortex Report prepared for the San José Retirement Boards*

**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 discuss how VC funds are organized, how investments are selected, and how due diligence is conducted. It will examine case studies that detail a transaction from beginning to end. 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. Session topics may include:

- Limited Partner/General Partner Negotiation and Contracting
- The VC Business Model: Sourcing, Screening, and Selection
- Venture Capital Valuation Method
- Term Sheets: The Venture Capitalist's and Entrepreneur's perspectives
- Deal Sourcing
- Managing Innovative Processes
- Later-Round Financing
- Preferred Stock Valuation
- Exit Strategies

See the website for more information about the program.

**Fees**

\$10,950

Fee includes lodging and meals.

**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

**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.

See the website for more information about the conference.

**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/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.

See the website for more information about the conference.

**Fees**

Not yet available.

**Contact**

Please go to the website to contact the conference organizer.

**Email**

N/A

**Link:** <https://prism-assoc.org/CustomPage/Index/29>

**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](mailto:mfinlan@icd.ca)

**Link:** <http://www.icd.ca/Courses/Short-Courses/HR-Compensation-Committee-Effectiveness.aspx>

**Course:** NFP Program

**Start Date:** May 13, 2019

**Organizer:** Institute of Corporate Directors and Rotman School of Management

**End Date:** May 14, 2019

**Location:** Vancouver, British Columbia, Canada

**Alternative Date(s) & Location(s)** March 25-26, 2019, Ottawa ON  
April 1-2, 2019, Winnipeg MB  
May 28-29, 2019, Toronto 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: April 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:** <http://www.icd.ca/Courses/NFP-Program.aspx>

**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 - guest seat (based on availability)  
\$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>

**Conference:** Chief Investment Officer Summit

**Start Date:** May 16, 2019

**Organizer:** Plan Sponsor

**End Date:** May 17, 2019

**Location:** New York, New York

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

**Topic Area:** General

**Attendance:** Open To All

This summit will bring together CIOs and senior investment consultants to discuss a range of issues from fund leverage to ESG, from private equity to artificial intelligence. They'll vet ideas on balancing governance models, team restructuring, benchmarks, and board alignment. The summit will feature a special session exclusively for CIOs, on a topic relevant to and decided by CIO summit registrants.

The summit is designed to address the investment, strategic and operational challenges facing asset owners with a minimum AUM of \$1B+ (pension funds, sovereign wealth funds, endowments & foundations, healthcare and insurance funds, large family offices).

See the website for more information about the conference.

**Fees**

No charge for plan sponsors.

**Contact**

Carol Popkins  
Phone: 203-461-0985

**Email**

carol.popkins@strategic-i.com

**Link:** <https://www.ai-cio.com/events/2019-chief-investment-officer-summit/>



**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.

The two-day program is designed with a clear focus on the educational needs of trustees who are relatively new to a pension plan board. The focus is on investing principles, board policies, and fundamental concepts that every trustee should know.

See the website for more information about the program.

**Fees**

\$665  
\$205 discount for registration by  
April 15, 2019.

**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:** 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

See the website for more information about the program.

**Fees**

\$1,020 - for two modules  
\$205 discount for registration by  
April 15, 2019.

**Contact**

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

**Email**

registration@ncpers.org

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



**Conference:** Annual Conference and Exhibition

**Start Date:** May 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

This conference provides a multitude of educational offerings for its members at all levels of experience. These opportunities will help you develop the knowledge, skills, and ideas you need to better serve your fund or union, move forward in your professional development, and engage effectively with colleagues across the country

See the website for more information about the conference.

**Fees**

\$1,020  
\$205 discount for registration by  
April 25, 2019.

**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)  
& Location(s)** May 13, 2019, Toronto ON  
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>

**Course:** NFP Program

**Start Date:** May 28, 2019

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

**End Date:** May 29, 2019

**Location:** Toronto, Ontario, Canada

**Alternative Date(s)** March 25-26, 2019, Ottawa ON

**& Location(s)** April 1-2, 2019, Winnipeg MB

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

Course full - accepting waitlist

**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: 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/>

**Conference: Plan Sponsor National Conference**

**Start Date:** June 05, 2019

**Organizer:** Plan Sponsor

**End Date:** June 07, 2019

**Location:** Washington, District of Columbia

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

**Topic Area:** General

**Attendance:** Open To All

This conference brings together a cross section of the industry: Plan sponsors, retirement plan advisers and providers that support plans and participants meet, also getting to dialog with legislative, legal and policy thought leaders. The conference will cover current trends and best practices, while discussing what lies ahead in retirement plan design, participant engagement and education, and investment options and solutions, as well as, legislative and regulatory updates.

See the website for more information about the conference.

**Fees**

No charge for plan sponsors.

**Contact**

Carol Popkins  
Phone: 203-461-0985

**Email**

carol.popkins@strategic-i.com

**Link:** <https://www.plansponsor.com/events/2019psnc/>

**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)** April 9-10, 2019, New York NY

**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  
\$2,395 - 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:** Investment Strategies and Portfolio Management

**Start Date:** June 10, 2019

**Organizer:** The Wharton School, University of Pennsylvania

**End Date:** June 14, 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 provides actionable theories and practical tools for addressing asset allocation, risk management, performance measurement, and investment policies. 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.

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  
Fee includes lodging and most meals.

**Contact**

Phone: 215.898.1776  
Toll-free: 1.800.255.3932

**Email**

execed@wharton.upenn.edu

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

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

**Start Date:** June 11, 2019

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

**End Date:** June 12, 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:** 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:** Open To All

This summit is the culmination of extensive research and engagement with NCPERS members and builds upon the successful launch of the CIO Summit in June 2018. It features dual tracks for CIOs and CEOs. Both programs focus on the distinct challenges mid-market plans face and provide plan executives the opportunity to collaboratively work together in solutions-focused small group discussions. The summit will feature:

- A target audience of chief officers from funds with assets between \$2 billion and \$60 billion.
- CIO and CEO Summit agendas developed by advisory faculties of peers.
- Solutions-focused group discussions after each general session.
- Limited attendees to promote active participation and discussion.
- Educational tracks closed to marketers from the vendor community.

See the website for more information about the conference.

**Fees**

\$1,000 - non-members  
\$650 - members

**Contact**

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

**Email**

registration@ncpers.org

**Link:** <https://www.ncpers.org/cos>

**Course:** Board Oversight of Strategy

**Start Date:** June 21, 2019

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

**End Date:** June 21, 2019

**Location:** Halifax, Nova Scotia, Canada

**Alternative Date(s) & Location(s)** March 11, 2019, Winnipeg MB  
April 8, 2019, Saskatoon SK  
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: May 24, 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:** 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](mailto:rwheeler@nctr.org)

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

**Conference: The Private Equity Exclusive**

**Start Date:** July 22, 2019

**Organizer:** The Pension Bridge

**End Date:** July 23, 2019

**Location:** Chicago, Illinois

**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 website for more information about the conference.

**Fees**

Not available. Please contact the conference organizer.

**Contact**

Phone: 561-455-2729  
Fax: 561-258-8258

**Email**

[info@pensionbridge.com](mailto:info@pensionbridge.com)

**Link:** <http://www.pensionbridge.com/agendape2018.asp>



**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/>



**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>

**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**

register@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 - guest seat (based on availability)

\$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/fall-2019-conference/>

**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  
\$100 discount for early registration

**Contact**

Alyssa Carlson

Phone: 202-624-1456

Fax: 202-624-1439

**Email**

registration@ncpers.org

**Link:** <https://www.ncpers.org/fundingforum>

**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 shareholder rights and vibrant, transparent and fair capital markets.

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

**Conference: Emerging Markets**

**Start Date:** September 24, 2019

**Organizer:** Pensions & Investments

**End Date:** September 24, 2019

**Location:** Chicago, Illinois

**Alternative Date(s)  
& Location(s)** September 26, 2019, New York NY

**Topic Area:** Investments

**Attendance:** By Invitation Only

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:** [https://www.pionline.com/conferences?event\\_type=conference](https://www.pionline.com/conferences?event_type=conference)

**Conference:** Emerging Markets  
**Organizer:** Pensions & Investments  
**Location:** New York, New York

**Start Date:** September 26, 2019  
**End Date:** September 26, 2019  
**Alternative Date(s) & Location(s)** September 24, 2019, Chicago IL

**Topic Area:** Investments

**Attendance:** By Invitation Only

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:** [https://www.pionline.com/conferences?event\\_type=conference](https://www.pionline.com/conferences?event_type=conference)

**Conference:** Annual Conference  
**Organizer:** National Council on Teacher Retirement (NCTR)  
**Location:** Nashville, Tennessee

**Start Date:** October 13, 2019  
**End Date:** October 15, 2019  
**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  
\$150 discount for early registration

**Contact**

Robyn Wheeler  
Phone: (916) 509-7260

**Email**

rwheeler@nctr.org

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

**Conference:** Managing Pension Risk & Liabilities

**Start Date:** October 15, 2019

**Organizer:** Pensions & Investments

**End Date:** October 16, 2019

**Location:** Austin, Texas

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

**Topic Area:** Investments

**Attendance:** By Invitation Only

More information about the conference is not yet available.

**Fees**

Not yet available.

**Contact**

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

**Email**

pi-registration@pionline.com

**Link:** [https://www.pionline.com/conferences?event\\_type=conference](https://www.pionline.com/conferences?event_type=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/events/events-overview/>

**Conference: Talent Acquisition Conference**

**Start Date:** October 17, 2019

**Organizer:** The Conference Board

**End Date:** October 18, 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: "A Focus on Your Future Workforce". The TA function is evolving with new technologies, new organizational structures, and new sourcing strategies. How will your organization focus on the future workforce? 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.

More information about the conference is not yet available.

**Fees**

\$2,895 - non-members  
\$2,395 - members  
\$400 discount for registration by August 10, 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=2952>

**Conference: Fixed Income Management**

**Start Date:** October 17, 2019

**Organizer:** CFA Institute - Hosted with the CFA Society Boston

**End Date:** October 18, 2019

**Location:** Boston, Massachusetts

**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.

More information about the conference is not yet available.

**Fees**

Last year's fee:  
\$1,595 - non-members  
\$1,295 - CFA members  
Registration opens May 2019.

**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-2019>

**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  
\$100 discount for early  
registration

**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 provides actionable theories and practical tools for addressing asset allocation, risk management, performance measurement, and investment policies. 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.

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

Fee includes lodging and most meals.

**Contact**

Phone: 215.898.1776

Toll-free: 1.800.255.3932

**Email**

execed@wharton.upenn.edu

**Link:** <http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/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

The 2019 Forum highlights the potential of unrewarded risks present in the market and also looks at how global economies and market participants' behavior in the 10 years since the financial crisis have changed and are impacting markets and creating opportunities. It will develop these themes alongside general and investor-specific risks inherent in the current investment environment, but also the opportunities that exist to help position portfolios for the short term and into the future. It will also highlight the ever-growing trend toward sustainable investing, which is now becoming standard.

See the website for more information about the conference.

**Fees**

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

**Contact**

Allison Vitale

Phone: +1 201 744 1758

**Email**

allison.vitale@mercer.com

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



**Conference:** Executive Compensation Conference

**Start Date:** October 24, 2019

**Organizer:** The Conference Board

**End Date:** October 25, 2019

**Location:** New York, New York

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

**Topic Area:** Human Resources

**Attendance:** Open To All

This conference will address how the executive compensation environment continues to change due to emerging best practices, the Tax Cuts and Jobs Act (162m), compensation design trends, impact of the Pay Ratio disclosure, reducing pay design complexity, pay disparity and more.

Other topics include:

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

More information about the conference is not yet available.

**Fees**

\$2,895 - non-members  
\$2,395 - members  
\$400 discount for registration by August 17, 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=3031>

**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

See the website for more information about the program.

**Fees**

Not yet available:  
May 18-19, 2019 fees: \$1,020 -  
for two modules  
\$205 discount for registration by  
April 15, 2019.

**Contact**

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

**Email**

registration@ncpers.org

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

**Conference:** Public Safety Conference

**Start Date:** October 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  
\$100 discount for early registration

**Contact**

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

**Email**

registration@ncpers.org

**Link:** <https://www.ncpers.org/Psc>

**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 concepts investors need to know to evaluate investment opportunities in the private equity space. Session topics include:

- Fund Structure
- Leveraged Buyout Model and Comparables Analysis
- Deal Origination, Transaction, and Execution
- Value Creation With Operations and Negotiation
- Advanced And Best Practices In Private Equity
- Commercial Due Diligence
- The Limited Partners' Perspective
- Growth Equity
- Middle Market Private Equity
- Private Equity In Emerging Economies

See the website for more information about the program.

**Fees**

\$10,950  
Fee includes lodging and meals.

**Contact**

Phone: 215.898.1776  
Toll-free: 1.800.255.3932

**Email**

execed@wharton.upenn.edu

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

**Conference:** Succession Management Conference

**Start Date:** November 05, 2019

**Organizer:** The Conference Board

**End Date:** November 06, 2019

**Location:** New York, New York

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

**Topic Area:** Human Resources

**Attendance:** Open To All

This conference will focus on practical ways to execute succession planning in today's complex environment to meet tomorrow's business needs, ultimately elevating your organization's ability to achieve integrated succession practices that deliver superior results. The emphasis this year will be on leveraging the complexity in our businesses to create a stronger talent bench. You will discover new and innovative approaches to succession planning, coupled with meaningful ways to bring them to life.

More information about the conference is not yet available.

**Fees**

\$2,895 - non-members  
\$2,395 - members  
\$400 discount for registration by  
August 24, 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=3030>

**Conference:** Multi-Asset Investing

**Start Date:** November 12, 2019

**Organizer:** Pensions & Investments

**End Date:** November 12, 2019

**Location:** Chicago, Illinois

**Alternative Date(s)  
& Location(s)** November 14, 2019, New York NY

**Topic Area:** Investments

**Attendance:** Open To All

Innovations in Outcome Oriented Investing: This conference will provide a platform for discussion and debate regarding why asset owners should consider a multi-asset approach, the various drivers behind them and how to utilize this strategy to maximize overall performance.

More information about the conference is not yet available.

**Fees**

Not yet available.

**Contact**

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

**Email**

pi-registration@pionline.com

**Link:** [https://www.pionline.com/conferences?event\\_type=conference](https://www.pionline.com/conferences?event_type=conference)

**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  
and other non-profit member  
\$2,670 - non-member

**Contact**

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

**Email**

[sacrs@sacrs.org](mailto:sacrs@sacrs.org)

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

**Conference: Multi-Asset Investing**

**Start Date:** November 14, 2019

**Organizer:** Pensions & Investments

**End Date:** November 14, 2019

**Location:** New York, New York

**Alternative Date(s)  
& Location(s)** November 12, 2019, Chicago IL

**Topic Area:** Investments

**Attendance:** Open To All

Innovations in Outcome Oriented Investing: This conference will provide a platform for discussion and debate regarding why asset owners should consider a multi-asset approach, the various drivers behind them and how to utilize this strategy to maximize overall performance.

More information about the conference is not yet available.

**Fees**

Not yet available.

**Contact**

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

**Email**

[pi-registration@pionline.com](mailto:pi-registration@pionline.com)

**Link:** [https://www.pionline.com/conferences?event\\_type=conference](https://www.pionline.com/conferences?event_type=conference)

**Conference:** Equity Research and Valuation

**Start Date:** November 14, 2019

**Organizer:** CFA Institute - Hosted with the CFA Society New York

**End Date:** November 15, 2019

**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**

Last year's fee:  
\$1,295 - non-members  
\$1,095 - CFA members

**Contact**

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

**Email**

ceprogram@cfainstitute.org

**Link:** [https://www.cfainstitute.org/events/conferences#f:\\_1B6D6486-F86C-4000-B58A-96F351AF4632=\[CFA%20Society%20New%20York\]](https://www.cfainstitute.org/events/conferences#f:_1B6D6486-F86C-4000-B58A-96F351AF4632=[CFA%20Society%20New%20York])

**Course:** Venture Capital

**Start Date:** December 08, 2019

**Organizer:** The Wharton School, University of Pennsylvania

**End Date:** December 12, 2019

**Location:** San Francisco, California

**Alternative Date(s)  
& Location(s)** May 6-10, 2019, Philadelphia PA

**Topic Area:** Investments

**Attendance:** Open To All

This program will discuss how VC funds are organized, how investments are selected, and how due diligence is conducted. It will examine case studies that detail a transaction from beginning to end. 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. Session topics may include:

- Limited Partner/General Partner Negotiation and Contracting
- The VC Business Model: Sourcing, Screening, and Selection
- Venture Capital Valuation Method
- Term Sheets: The Venture Capitalist's and Entrepreneur's perspectives
- Deal Sourcing
- Managing Innovative Processes
- Later-Round Financing
- Preferred Stock Valuation
- Exit Strategies

See the website for more information about the program.

**Fees**

\$10,950  
Fee includes meals but not accommodations.

**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:** Legislative Conference

**Start Date:** January 26, 2020

**Organizer:** National Conference on Public Employee Retirement Systems

**End Date:** January 28, 2020

**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.

More information about the conference is not yet available.

**Fees**

Not yet available.  
2019 fees: \$600

**Contact**

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

**Email**

registration@ncpers.org

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

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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](mailto:info@cortexconsulting.com)