CORTEX
APPLIED RESEARCH

The Cortex Report

Customized for the

San José Retirement Boards

May 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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Table of Contents

Table of Contents

Table of Contents

Event Listings

Conference: **Remaking Retirement? Debt in an Aging Economy**
Organizer: Pension Research Council, The Wharton School
Location: Philadelphia, Pennsylvania
Start Date: May 02, 2019
End Date: May 03, 2019
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**
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania
Start Date: May 06, 2019
End Date: May 10, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

This program will 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. Session is full. Contact program organizer for waitlist.

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

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

Topic Area: General
Attendance: Open To All

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

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/

Course: **The School of Pension Investment Management (SPIM)**
Organizer: Mercer and Schulich School of Business, York University
Location: Toronto, Ontario, Canada
Start Date: May 07, 2019
End Date: May 08, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: General
Attendance: Open To All

This is an intensive two-day seminar designed to provide pension plan fiduciaries with the knowledge to improve the overall governance and management of their defined benefit pension fund. The core areas of study are the following:
• Fiduciary responsibility and prudent governance
• Principles of pension finance and investment
• Asset mix policy and risk management
• Manager structure, currency management, active and passive management
• Investment monitoring and oversight
The curriculum will also feature these additional topics:
• Alternative investments
• Responsible investing programs
• Group decision-making

See the website for more information about the program.

Fees

CAD $ 2,700 + HST

Contact

Mohani Balraj
Phone: +1 416 868-2985

Email

mohani.balraj@mercer.com

Link: https://www.mercer.ca/en/events/school-of-pension-investment-management.html

Conference: **Annual Conference**
Organizer: Public Retirement Information Systems Management (PRISM)
Location: Indianapolis, Indiana

Start Date: May 12, 2019
End Date: May 15, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Operations
Attendance: Members Only

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

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**
Organizer: Institute of Corporate Directors
Location: Toronto, Ontario, Canada

Start Date: May 13, 2019
End Date: May 13, 2019
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: **NFP Program**

Organizer: Institute of Corporate Directors and Rotman School of Management

Location: Vancouver, British Columbia, Canada

Start Date: May 13, 2019

End Date: May 14, 2019

Alternative Date(s) & Location(s) 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
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

Course: **Global Asset Allocation**

Organizer: BCA Research - Approved by the CFA Institute

Location: Toronto, Ontario, Canada

Start Date: May 13, 2019

End Date: May 13, 2019

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

Topic Area: Investments

Attendance: Open To All

BCA has been an independent provider of global investment research for over 65 years. Markets are, to use Paul Samuelson's phrase, "micro efficient but macro inefficient." CIOs, asset allocators, and investment professionals often struggle to find a practical way to construct optimal multi-asset portfolios. 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**

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

Location: New York, New York

Start Date: May 14, 2019

End Date: May 15, 2019

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

Topic Area: Investments

Attendance: Members Only

This conference is titled Retirement Investing / FinTech and Analytics: The State of the Art Part I. The latest quantitative and Artificial Intelligence (AI) techniques will be explored in Finance. 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.
See the website for more information about the conference.

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**

Organizer: Institute of Corporate Directors

Location: Ottawa, Ontario, Canada

Start Date: May 15, 2019

End Date: May 15, 2019

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

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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**
Organizer: Plan Sponsor
Location: New York, New York
Start Date: May 16, 2019
End Date: May 17, 2019
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**
Organizer: National Conference on Public Employee Retirement Systems
Location: Austin, Texas
Start Date: May 18, 2019
End Date: May 19, 2019
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**

Organizer: National Conference on Public Employee Retirement Systems

Location: Austin, Texas

Start Date: May 18, 2019

End Date: May 19, 2019

Alternative Date(s) & Location(s) October 26-27, 2019, New Orleans LA

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: **Advanced Trustee Studies**

Organizer: National Conference on Public Employee Retirement Systems

Location: Austin, Texas

Start Date: May 18, 2019

End Date: May 19, 2019

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

Topic Area: Board Governance & Leadership

Attendance: Members Only

This program is designed for advanced trustees who seek a more intensive, in-depth learning experience. Each year's program will focus on two topics of particular importance to pension plan trustees, enabling participants to dig deeper and fully explore issues with their counterparts from around the nation. Topics change from year to year and may include ethics, legal developments, and alternative investments, among other timely themes.

The program, developed more than a decade ago in consultation with Harvard Law School, is formatted to foster dialogue and interaction among attendees.

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: **Annual Conference and Exhibition**

Organizer: National Conference on Public Employee Retirement Systems

Location: Austin, Texas

Start Date: May 19, 2019

End Date: May 22, 2019

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**

Organizer: Institute of Corporate Directors

Location: Vancouver, British Columbia, Canada

Start Date: May 21, 2019

End Date: May 21, 2019

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**

Organizer: Institute of Corporate Directors

Location: Calgary, Alberta, Canada

Start Date: May 23, 2019

End Date: May 23, 2019

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

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Course: **NFP Program**

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

Location: Toronto, Ontario, Canada

Start Date: May 28, 2019

End Date: May 29, 2019

Alternative Date(s) & Location(s)
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**
Organizer: International Centre for Pension Management (ICPM)
Location: Vancouver, Ontario, Canada
Start Date: June 02, 2019
End Date: June 04, 2019
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/icpm-discussion-forum-vancouver-2019/

Conference: **Plan Sponsor National Conference**
Organizer: Plan Sponsor
Location: Washington, District of Columbia
Start Date: June 05, 2019
End Date: June 07, 2019
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: **Defined Contribution Program**

Organizer: International Centre for Pension Management (ICPM) - jointly with NEST

Location: Vancouver, Ontario, Canada

Start Date: June 05, 2019

End Date: June 06, 2019

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

Topic Area: General

Attendance: By Invitation Only

This program will take place immediately following the ICPM Discussion Forum. The goal of the event is to bring together asset owners, academics, policy-makers and selected industry representatives to discuss the major issues facing DC systems globally and to highlight best practice in responding to those issues. Program topics include:

- High-level Overview of Issues for DC systems
- System Design Challenges: Reaching New Groups of Savers
- Innovation in DC–Investment Design & Retirement Income Design
- Changing Saver Behaviour – What Works?
- What Can We Learn from Fintech?
- Future Innovation and Opportunity
- Increasing Trust and Transparency

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/icpm-discussion-forum-vancouver-2019/

Conference: **Leadership Development Conference**

Organizer: The Conference Board

Location: San Diego, California

Start Date: June 06, 2019

End Date: June 07, 2019

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.

By attending this conference, you will:

- Learn how to develop a pipeline of leaders who will lead effectively in the next decade.
- Better understand the skills and attributes that future leaders must possess.
- Discover today's latest trends and practical solutions for developing leaders.
- Gain insights, ideas, and inspiration from top researchers and practitioners.
- Discover innovative solutions to strengthen the capability of leaders at all levels.
- Explore leadership behavior that engages employees and drives culture.
- Network and collaborate with your leadership development peers.

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=3026

Conference: **Trustees' Roundtable**
Organizer: California Association of Public Retirement Systems (CALAPRS)
Location: Glendale, California

Start Date: June 07, 2019
End Date: June 07, 2019
Alternative Date(s) & Location(s) October 25, 2019, Oakland CA

Topic Area: General
Attendance: Members Only

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

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

info@calaprs.org

Link: https://www.calaprs.org/events/EventDetails.aspx?id=1202792&group=

Course: **Investment Strategies and Portfolio Management**
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania

Start Date: June 10, 2019
End Date: June 14, 2019
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: **Geopolitics and Investing**
Organizer: BCA Research - Approved by the CFA Institute
Location: Washington, District of Columbia
Start Date: June 10, 2019
End Date: June 10, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

BCA has been an independent provider of global investment research for over 65 years. Geopolitical analysis is an essential component of a sound investment strategy. Shifts in the global balance of power away from the U.S., growing demands for populist policies in Anglo-Saxon economies, and the 'crisis of expectations' among EM middle classes reinforce the view that geopolitical risk to investment portfolios is not a fad.

The course combines seventy years of macroeconomic research with geopolitical risk analysis. The 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.

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?

Course: **Board Risk Oversight and Insight Program**
Organizer: Global Risk Institute & Rotman School of Management, University of
Location: Toronto, Ontario, Canada
Start Date: June 11, 2019
End Date: June 12, 2019
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

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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**
Organizer: National Conference on Public Employee Retirement Systems
Location: Chicago, Illinois
Start Date: June 12, 2019
End Date: June 14, 2019
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**
Organizer: Institute of Corporate Directors and Rotman School of Management (U of
Location: Halifax, Nova Scotia, Canada
Start Date: June 21, 2019
End Date: June 21, 2019
Alternative Date(s) & Location(s) N/A

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**
Organizer: Pacific Pension Institute
Location: Chicago, Illinois
Start Date: July 10, 2019
End Date: July 12, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Risk Management
Attendance: Members Only

Pacific Pension & Investment Institute (PPI) convenes global pension and investment thought leaders for in-depth dialogue and knowledge sharing on issues facing long-term institutional investors in Asia and the Pacific Rim. PPI is a global organization with individual and institutional members from leading pension funds, sovereign wealth funds, endowments, foundations, commercial asset management and other investment experts.

The 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

See the website for more information about the conference.

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**
Organizer: National Council on Teacher Retirement (NCTR)
Location: Berkeley, California
Start Date: July 21, 2019
End Date: July 24, 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.

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.

See the website for more information about the conference.

Fees

$2,550
Registration opens in May 2019.

Contact

Robyn Wheeler
Phone: (916) 509-7260

Email

rwheeler@nctr.org

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

Conference: **The Private Equity Exclusive**
Organizer: The Pension Bridge
Location: Chicago, Illinois
Start Date: July 22, 2019
End Date: July 23, 2019
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

Link: http://www.pensionbridge.com/agendape2019.asp

Course: **International and Emerging Market Investing**
Organizer: Wharton School, University of Pennsylvania - for the IFEBP
Location: San Francisco, California
Start Date: July 22, 2019
End Date: July 24, 2019
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**
Organizer: SACRS & Haas School of Business, UC Berkeley
Location: Berkeley, California
Start Date: July 22, 2019
End Date: July 24, 2019
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**
Organizer: National Association of State Retirement Administrators (NASRA)
Location: Williamsburg, Virginia
Start Date: August 03, 2019
End Date: August 07, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: General
Attendance: Members Only

NASRA was founded in 1955 as a non-profit association whose members are the directors of the nation's state, territorial, and largest statewide public retirement systems. Its members oversee retirement systems that hold more than two-thirds of the $4.2 trillion held in trust for 15 million working and 10 million retired employees of state and local government. Its mission is to serve its members in managing sustainable public employee retirement systems through research, education, and collaboration.

The annual conference features leaders in the fields of retirement plan investment and administration covering a variety of subjects including investment management, world events applicable to the pension industry, the economy, human resources, trends, and more.

More information about the conference is not yet available.

Fees

Not yet available

Contact

Mary Hiatte
Phone: 202.624.1418

Email

mary@nasra.org

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

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

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

Topic Area: General
Attendance: Members Only

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

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

Fees

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

Contact

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

Email

register@calaprs.org

Link: https://www.calaprs.org/events/EventDetails.aspx?id=1131365&group=

Conference: **Fall Conference**
Organizer: Journal of Investment Management - Approved by the CFA Institute
Location: Cambridge, Massachusetts

Start Date: September 08, 2019
End Date: September 10, 2019
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**
Organizer: National Conference on Public Employee Retirement Systems
Location: New York, New York
Start Date: September 11, 2019
End Date: September 13, 2019
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
Registration will open in June 2019.

Contact

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

Email

registration@ncpers.org

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

Conference: **Fall Conference**
Organizer: Council of Institutional Investors
Location: Minneapolis, Minnesota
Start Date: September 16, 2019
End Date: September 18, 2019
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.

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: **East Coast Private Markets Summit**
Organizer: Institutional Investor
Location: Boston, Massachusetts
Start Date: September 17, 2019
End Date: September 17, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: By Invitation Only

The theme for this conference is: Private Markets 2.0: Building a Future-Proof Portfolio.
The largest asset owners across North America continue to show confidence in private markets. Allocations to an array of strategies across private equity, debt, infrastructure and real estate are on the rise, as institutional investors commit to building out and enhancing their private market programs. Yet, in a world where the outlook for the next ten years looks drastically different to the last ten, investors need to be aware of how new developments in the industry might disrupt and impact the way they invest. Rising rates, shrinking public markets, geopolitical tensions, technological advancement, and environmental risks are just a few.

More information about the conference is not yet available.

Fees

Not available. Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: https://www.iiconferences.com/Institutional-Investor-Forums/3rd-Annual-East-Coast-Private-Markets-Summit

Conference: **Emerging Markets**
Organizer: Pensions & Investments
Location: Chicago, Illinois
Start Date: September 24, 2019
End Date: September 24, 2019
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://conferences.pionline.com/conference/emerging-markets/2019

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://conferences.pionline.com/conference/emerging-markets/2019

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

$1,300
Registration opens in July 2019.

Contact

Robyn Wheeler
Phone: (916) 509-7260

Email

rwheeler@nctr.org

Link: https://nctr.org/upcoming-events/conference/

Conference: **ICGN Miami Conference**

Organizer: International Corporate Governance Network (ICGN) - Hosted by

Location: Miami, Florida

Start Date: October 15, 2019

End Date: October 16, 2019

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

Topic Area: Corporate Governance

Attendance: Members Only

This conference will be hosted by the Florida State Board of Administration (SBA). The State of Florida has been a long-standing advocate for good corporate governance and has pursued this in a variety of mediums. They are among the most active of the state pension plans in the US corporate governance arena. Investors around the world benefit from such active and engaged owners. This conference aims to help keep attendees informed of the latest corporate governance developments, by providing best practice guidance, updates from policy makers and insights from leading speakers in both industry and academia, in a format that maximises networking opportunities with the senior professionals in attendance.

See the website for more information about the conference.

Fees

£600 - non-members
£550 - CII members
£500 - ICGN members

Contact

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

Email

elizabeth.thomas@icgn.org

Link: https://www.icgn.org/events/icgn-miami-conference

Conference: **Managing Pension Risk & Liabilities**

Organizer: Pensions & Investments

Location: Austin, Texas

Start Date: October 15, 2019

End Date: October 16, 2019

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

Topic Area: Investments

Attendance: By Invitation Only

Pension risk management has become very complicated over the past several years with the changing economic and regulatory environments, and an array of strategies from which to choose. This conference will provide actionable information for developing, implementing and managing pension risk no matter the strategy chosen.

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/pension-risk/2019

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

Organizer: Pension Real Estate Association (PREA)

Location: Washington, District of Columbia

Start Date: October 16, 2019

End Date: October 18, 2019

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

Topic Area: Investments

Attendance: Open To All

The Pension Real Estate Association (PREA) is a non-profit trade association for the global institutional real estate investment industry. PREA currently lists over 700 corporate member firms across the United States, Canada, Europe and Asia. Its members include public and corporate pension funds, endowments, foundations, Taft-Hartley funds, insurance companies, investment advisory firms, REITs, developers, real estate operating companies and industry service providers.

PREA holds two major conferences each year: the Spring Conference and the Annual Institutional Investor Real Estate Conference.

More information about the conference is not yet available.

Fees

Not 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/upcoming-events/

Conference: **Talent Acquisition Conference**

Organizer: The Conference Board

Location: New York, New York

Start Date: October 17, 2019

End Date: October 18, 2019

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.

See the website for more information about the conference.

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=3028

Conference: **Fixed Income Management**
Organizer: CFA Institute - Hosted with the CFA Society Boston
Location: Boston, Massachusetts
Start Date: October 17, 2019
End Date: October 18, 2019
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

Not yet available.
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**
Organizer: National Pension Education Association (NPEA)
Location: Naples, Florida
Start Date: October 19, 2019
End Date: October 23, 2019
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.

See the website for more information about the conference.

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**
Organizer: Public Pension Financial Forum (P2F2)
Location: Salt Lake City, Utah

Start Date: October 20, 2019
End Date: October 23, 2019
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

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

Start Date: October 20, 2019
End Date: October 23, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: General
Attendance: Open To All

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

More information about the conference is not yet available.

Fees

Last year's fees:
$1,715 - non-members
$1,410 - members
$300 discount for early registration

Contact

Phone: 703.516.9300
Fax: 703.516.9308

Email

customercare@asppa-net.org

Link: http://asppaannual.org/

Course: **Investment Strategies and Portfolio Management**
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania
Start Date: October 21, 2019
End Date: October 25, 2019
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**
Organizer: Mercer
Location: Boston, Massachusetts
Start Date: October 22, 2019
End Date: October 23, 2019
Alternative Date(s) & Location(s) 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**
Organizer: The Conference Board
Location: New York, New York
Start Date: October 24, 2019
End Date: October 25, 2019
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

See the website for more information about the conference.

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: **Trustees' Roundtable**
Organizer: California Association of Public Retirement Systems (CALAPRS)
Location: Oakland, California
Start Date: October 25, 2019
End Date: October 25, 2019
Alternative Date(s) & Location(s) June 7, 2019, Glendale CA

Topic Area: General
Attendance: Members Only

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

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

info@calaprs.org

Link: https://www.calaprs.org/events/EventDetails.aspx?id=1202792&group=

Conference: **Accredited Fiduciary (NAF) Program**
Organizer: National Conference on Public Employee Retirement Systems
Location: New Orleans, Louisiana
Start Date: October 26, 2019
End Date: October 27, 2019
Alternative Date(s) & Location(s) May 18-19, 2019, Austin TX

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
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Email

registration@ncpers.org

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

Conference: **Public Safety Conference**
Organizer: National Conference on Public Employee Retirement Systems
Location: New Orleans, Louisiana
Start Date: October 27, 2019
End Date: October 30, 2019
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

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Link: https://www.ncpers.org/Psc

Course: **Private Equity: Investing and Creating Value**
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania
Start Date: November 04, 2019
End Date: November 08, 2019
Alternative Date(s) & Location(s) N/A

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

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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**
Organizer: The Conference Board
Location: New York, New York
Start Date: November 05, 2019
End Date: November 06, 2019
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.

See the website for more information about the conference.

Fees

$2,895 - non-members
$2,395 - members
$400 discount for registration by August 24, 2019.

Contact

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Email

customer.service@conferenceboard.org

Link: https://www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=3030

Conference: **Multi-Asset Investing**
Organizer: Pensions & Investments
Location: Chicago, Illinois
Start Date: November 12, 2019
End Date: November 12, 2019
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
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Email

pi-registration@pionline.com

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

Conference: **Fall Conference**
Organizer: State Association of County Retirement Systems (SACRS)
Location: Monterey, California
Start Date: November 12, 2019
End Date: November 15, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: General
Attendance: Open To All

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

More information about the conference is not yet available.

Fees

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

Contact

Phone: 916-441-1850
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Email

sacrs@sacrs.org

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

Conference: **Multi-Asset Investing**
Organizer: Pensions & Investments
Location: New York, New York
Start Date: November 14, 2019
End Date: November 14, 2019
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

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pi-registration@pionline.com

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

Conference: **Equity Research and Valuation**
Organizer: CFA Institute - Hosted with the CFA Society New York
Location: New York, New York
Start Date: November 14, 2019
End Date: November 15, 2019
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

Not yet available.
Last year's fee:
$1,295 - non-members
$1,095 - CFA members

Contact

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Email

ceprogram@cfainstitute.org

Link: https://www.cfainstitute.org/en/events/conferences/equity-2019

Conference: **RI Americas**
Organizer: Responsible Investor
Location: New York, New York
Start Date: December 04, 2019
End Date: December 05, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

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

More information about the conference is not yet available.

Fees

No charge for asset owner and investment consultants.

Contact

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Email

hamish@responsible-investor.com

Link: https://www.responsible-investor.com/events/events_page/ri_americas_2019/

Conference: **Investing for Good USA**
Organizer: Financial Times (FT)
Location: New York, New York
Start Date: December 05, 2019
End Date: December 05, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

As increasing numbers of individuals, foundations and institutions look to make investments that are focused on positive impact while generating a financial return, a growing number of funds and investors are looking to the United Nation's Sustainable Development Goals (SDGs) as a framework for their investments. Given that, by some estimates, $3-$5 trillion annually will be needed to meet the goals, capital markets have a key role to play. But while there is much talk in the investment community about the SDGs, what will it take to turn enthusiasm into action, enabling greater financial flows to be directed towards the goals?

The theme for this conference is: Mobilising Private Capital to Meet the SDGs. Institutional investors, wealth managers, foundations, government, family offices, social entrepreneurs and others will discuss how innovative finance could support meeting the SDGs while also providing a financial return.

See the website for more information about the conference.

Fees

Not yet available.

Contact

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Email

ftlive@ft.com

Link: https://live.ft.com/Events/2019/FT-Investing-for-Good-USA

Course: **Venture Capital**
Organizer: The Wharton School, University of Pennsylvania
Location: San Francisco, California
Start Date: December 08, 2019
End Date: December 12, 2019
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 accomodations.

Contact

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Email

execed@wharton.upenn.edu

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

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Conference: **Legislative Conference**
Organizer: National Conference on Public Employee Retirement Systems
Location: Washington, District of Columbia
Start Date: January 26, 2020
End Date: January 28, 2020
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

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

Conference: **PREA Spring Conference**

Organizer: Pension Real Estate Association (PREA)

Location: Beverly Hills, California

Start Date: March 04, 2020

End Date: March 05, 2020

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

Not yet available.
Last year's fee:
$525 - non-member
$150 - member

Contact

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