



# ***The Cortex Report***

**Customized for the**  
**San José Retirement Boards**

**May 2019**

This page is intentionally left blank

## Introduction

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

Education events are sorted in chronological order, and include information such as event name, event sponsor/provider, date, target audience, topic areas, fees, and a general description. Each event listing also contains a link to the event sponsor's website. If you are interested in attending an education event, please be sure to check the sponsor's website for complete details.

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

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

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

This page is intentionally left blank

# Table of Contents

Start Date	Organizer	Event	Location	Page	
May 02, 2019	Pension Research Council, The Wharton School	Remaking Retirement? Debt in an Aging Economy	Philadelphia	1	
May 06, 2019	The Wharton School, University of Pennsylvania	Venture Capital	Philadelphia	1	
May 07, 2019	State Association of County Retirement Systems (SACRS)	Spring Conference	Lake Tahoe	2	
May 07, 2019	Mercer and Schulich School of Business, York University	The School of Pension Investment Management (SPIM)	Toronto	2	New
May 12, 2019	Public Retirement Information Systems Management (PRISM)	Annual Conference	Indianapolis	3	
May 13, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Toronto	3	
May 13, 2019	Institute of Corporate Directors and Rotman School of Management (UofT)	NFP Program	Vancouver	4	
May 13, 2019	BCA Research - Approved by the CFA Institute	Global Asset Allocation	Toronto	4	
May 14, 2019	Journal of Investment Management - Approved by the CFA Institute	Spring Conference	New York	5	
May 15, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Ottawa	5	
May 16, 2019	Plan Sponsor	Chief Investment Officer Summit	New York	6	
May 18, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Trustee Education Seminar	Austin	6	
May 18, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	Austin	7	
May 18, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Advanced Trustee Studies	Austin	7	New
May 19, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference and Exhibition	Austin	8	
May 21, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Vancouver	8	
May 23, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Calgary	9	
May 28, 2019	Institute of Corporate Directors and Rotman School of Management (U of T)	NFP Program	Toronto	9	
Jun 02, 2019	International Centre for Pension Management (ICPM)	Discussion Forum	Vancouver	10	
Jun 05, 2019	Plan Sponsor	Plan Sponsor National Conference	Washington	10	
Jun 05, 2019	International Centre for Pension Management (ICPM) - jointly with NEST & The Aspen	Defined Contribution Program	Vancouver	11	New
Jun 06, 2019	The Conference Board	Leadership Development Conference	San Diego	11	
Jun 07, 2019	California Association of Public Retirement Systems (CALAPRS)	Trustees' Roundtable	Glendale	12	New
Jun 10, 2019	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia	12	
Jun 10, 2019	BCA Research - Approved by the CFA Institute	Geopolitics and Investing	Washington	13	

# Table of Contents

Start Date	Organizer	Event	Location	Page
Jun 11, 2019	Global Risk Institute & Rotman School of Management, University of Toronto	Board Risk Oversight and Insight Program	Toronto	13
Jun 12, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Chief Officers Summit	Chicago	14
Jun 21, 2019	Institute of Corporate Directors and Rotman School of Management (U of T)	Board Oversight of Strategy	Halifax	14
Jul 10, 2019	Pacific Pension Institute	Summer Roundtable	Chicago	15
Jul 21, 2019	National Council on Teacher Retirement (NCTR)	Trustee Workshop	Berkeley	15
Jul 22, 2019	The Pension Bridge	The Private Equity Exclusive	Chicago	16
Jul 22, 2019	Wharton School, University of Pennsylvania - for the IFEBP	International and Emerging Market Investing	San Francisco	16
Jul 22, 2019	SACRS & Haas School of Business, UC Berkeley	Public Pension Investment Management Program	Berkeley	17
Aug 03, 2019	National Association of State Retirement Administrators (NASRA)	Annual Conference	Williamsburg	17
Aug 26, 2019	CALAPRS - In association with Pepperdine University	Principles of Pension Management for Trustees	Malibu	18
Sep 08, 2019	Journal of Investment Management - Approved by the CFA Institute	Fall Conference	Cambridge	18
Sep 11, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Public Pension Funding Forum	New York	19
Sep 16, 2019	Council of Institutional Investors	Fall Conference	Minneapolis	19
Sep 17, 2019	Institutional Investor	East Coast Private Markets Summit	Boston	20 <i>New</i>
Sep 24, 2019	Pensions & Investments	Emerging Markets	Chicago	20
Sep 26, 2019	Pensions & Investments	Emerging Markets	New York	21
Oct 13, 2019	National Council on Teacher Retirement (NCTR)	Annual Conference	Nashville	21
Oct 15, 2019	International Corporate Governance Network (ICGN) - Hosted by Eumedion	ICGN Miami Conference	Miami	22 <i>New</i>
Oct 15, 2019	Pensions & Investments	Managing Pension Risk & Liabilities	Austin	22
Oct 16, 2019	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Washington	23
Oct 17, 2019	The Conference Board	Talent Acquisition Conference	New York	23
Oct 17, 2019	CFA Institute - Hosted with the CFA Society Boston	Fixed Income Management	Boston	24
Oct 19, 2019	National Pension Education Association (NPEA)	Annual Conference	Naples	24
Oct 20, 2019	Public Pension Financial Forum (P2F2)	Annual Conference	Salt Lake City	25
Oct 20, 2019	American Society of Pension Professionals & Actuaries (ASPPA)	Annual Conference	National Harbor	25 <i>New</i>

# Table of Contents

Start Date	Organizer	Event	Location	Page	
Oct 21, 2019	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia	26	
Oct 22, 2019	Mercer	Global Investment Forum	Boston	26	
Oct 24, 2019	The Conference Board	Executive Compensation Conference	New York	27	
Oct 25, 2019	California Association of Public Retirement Systems (CALAPRS)	Trustees' Roundtable	Oakland	27	New
Oct 26, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	New Orleans	28	
Oct 27, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Public Safety Conference	New Orleans	28	
Nov 04, 2019	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia	29	
Nov 05, 2019	The Conference Board	Succession Management Conference	New York	29	
Nov 12, 2019	Pensions & Investments	Multi-Asset Investing	Chicago	30	
Nov 12, 2019	State Association of County Retirement Systems (SACRS)	Fall Conference	Monterey	30	
Nov 14, 2019	Pensions & Investments	Multi-Asset Investing	New York	31	
Nov 14, 2019	CFA Institute - Hosted with the CFA Society New York	Equity Research and Valuation	New York	31	
Dec 04, 2019	Responsible Investor	RI Americas	New York	32	New
Dec 05, 2019	Financial Times (FT)	Investing for Good USA	New York	32	New
Dec 08, 2019	The Wharton School, University of Pennsylvania	Venture Capital	San Francisco	33	
Jan 26, 2020	National Conference on Public Employee Retirement Systems (NCPERS)	Legislative Conference	Washington	33	
Mar 04, 2020	Pension Real Estate Association (PREA)	PREA Spring Conference	Beverly Hills	34	New

## ***Event Listings***



**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](mailto:prc@wharton.upenn.edu)

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

**Course:** Venture Capital

**Start Date:** May 06, 2019

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

**End Date:** May 10, 2019

**Location:** Philadelphia, Pennsylvania

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

**Topic Area:** Investments

**Attendance:** Open To All

This program will 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](mailto:execed@wharton.upenn.edu)

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

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

**Conference:** Spring Conference

**Start Date:** May 07, 2019

**Organizer:** State Association of County Retirement Systems (SACRS)

**End Date:** May 10, 2019

**Location:** Lake Tahoe, California

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

**Topic Area:** General

**Attendance:** Open To All

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

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)

**Start Date:** May 07, 2019

**Organizer:** Mercer and Schulich School of Business, York University

**End Date:** May 08, 2019

**Location:** Toronto, Ontario, Canada

**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

**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)** 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

**Start Date:** May 13, 2019

**Organizer:** BCA Research - Approved by the CFA Institute

**End Date:** May 13, 2019

**Location:** Toronto, Ontario, Canada

**Alternative Date(s) & Location(s)** 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

**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 / 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

**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:** Austin, Texas

**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

**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 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

**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)** May 13-14, 2019, Vancouver BC

**& Location(s)**

**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/icpm-discussion-forum-vancouver-2019/>

**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: Defined Contribution Program**

**Start Date:** June 05, 2019

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

**End Date:** June 06, 2019

**Location:** Vancouver, Ontario, Canada

**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**

**Start Date:** June 06, 2019

**Organizer:** The Conference Board

**End Date:** June 07, 2019

**Location:** San Diego, California

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

**Topic Area:** Human Resources

**Attendance:** Open To All

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

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

**Start Date:** June 07, 2019

**Organizer:** California Association of Public Retirement Systems (CALAPRS)

**End Date:** June 07, 2019

**Location:** Glendale, California

**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

**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:** Geopolitics and Investing

**Start Date:** June 10, 2019

**Organizer:** BCA Research - Approved by the CFA Institute

**End Date:** June 10, 2019

**Location:** Washington, District of Columbia

**Alternative Date(s)  
& Location(s)** 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

**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)** 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>

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

**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) 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

**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.

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

**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

**Link:** <http://www.pensionbridge.com/agendape2019.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>



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

**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>

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

**Course:** Principles of Pension Management for Trustees

**Start Date:** August 26, 2019

**Organizer:** CALAPRS - In association with Pepperdine University

**End Date:** August 29, 2019

**Location:** Malibu, California

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

**Topic Area:** General

**Attendance:** Members Only

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

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

**Fees**

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

**Contact**

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

**Email**

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  
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**

**Start Date:** September 16, 2019

**Organizer:** Council of Institutional Investors

**End Date:** September 18, 2019

**Location:** Minneapolis, Minnesota

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

**Topic Area:** Corporate Governance

**Attendance:** Members Only

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

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:** East Coast Private Markets Summit

**Start Date:** September 17, 2019

**Organizer:** Institutional Investor

**End Date:** September 17, 2019

**Location:** Boston, Massachusetts

**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

**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://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**

**Start Date:** October 15, 2019

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

**End Date:** October 16, 2019

**Location:** Miami, Florida

**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**

**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

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

**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/upcoming-events/>

**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.

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

**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**

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

**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.

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

**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>

**Conference:** Annual Conference

**Start Date:** October 20, 2019

**Organizer:** American Society of Pension Professionals & Actuaries (ASPPA)

**End Date:** October 23, 2019

**Location:** National Harbor, Maryland

**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

**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)** 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>

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

**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

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

**Start Date:** October 25, 2019

**Organizer:** California Association of Public Retirement Systems (CALAPRS)

**End Date:** October 25, 2019

**Location:** Oakland, California

**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**

**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)** 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  
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)** 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**

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.

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**

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

**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**

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:** 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**

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

**Email**

ceprogram@cfainstitute.org

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



**Conference:** RI Americas

**Start Date:** December 04, 2019

**Organizer:** Responsible Investor

**End Date:** December 05, 2019

**Location:** New York, New York

**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**

Hamish Stewart  
Phone: +44 20 7680 7162

**Email**

hamish@responsible-investor.com

**Link:** [https://www.responsible-investor.com/events/events\\_page/ri\\_americas\\_2019/](https://www.responsible-investor.com/events/events_page/ri_americas_2019/)

**Conference:** Investing for Good USA

**Start Date:** December 05, 2019

**Organizer:** Financial Times (FT)

**End Date:** December 05, 2019

**Location:** New York, New York

**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**

Phone: +44 (0)20 7775 6653

**Email**

ftlive@ft.com

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



**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>

**Conference:** PREA Spring Conference

**Start Date:** March 04, 2020

**Organizer:** Pension Real Estate Association (PREA)

**End Date:** March 05, 2020

**Location:** Beverly Hills, California

**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**

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

**Email**

amy@prea.org

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

### **Terms and Conditions for use of the Cortex Report**

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

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

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