



The Cortex Report

Customized for the

San José Retirement Boards

September 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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Event Listings

The Cortex Report prepared for the San José Retirement Boards

Course: Governing for Nonprofit Excellence: Critical Issues for Board

Start Date: September 04, 2019

Organizer: Harvard Business School, Harvard University

End Date: September 07, 2019

Location: Cambridge, Massachusetts

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

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program delves into the critical issues facing nonprofit board leaders. You will examine the latest governance frameworks, performance and measurement systems, oversight models for ensuring accountability and compliance, and the dynamics between boards and CEOs. As you gain insight into four essential competencies of nonprofit governance—board leadership, strategic stewardship, performance measurement, and financial oversight—you will learn how to drive the strategic and organizational transformation that enables your nonprofit organization to thrive. With a deeper understanding of board roles and responsibilities, you will emerge a stronger leader and a more strategic steward for your organization.

See the website for more information about the program.

Fees

\$5,000
Covers tuition, books,
accommodation & most meals

Contact

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

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/governing-nonprofit-excellence-critical-issues-board-leadership/>

Conference: Fall Conference

Start Date: September 08, 2019

Organizer: Journal of Investment Management

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. It explores some of the policy considerations currently being discussed and the implications to investment management strategy. Leading experts from both academia and the profession will provide insights on the issues. This event is co-sponsored with the MIT Sloan Finance Group and MIT Golub Center for Finance and Policy. The lineup of speakers includes:

Robert Merton, MIT Sloan School of Management, Keynote Speaker

Zvi Bodie, Bodie Associates

Sanjiv Das and Dan Ostrov, Santa Clara University

Deborah Lucas, MIT Golub Center for Finance and Policy

Arun Muralidhar, Mcube Investment Technologies

Hayne Leland, A&P Capital, LLC

Matthew O'Hara, BlackRock

Antoinette Schoar, Massachusetts Institute of Technology

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/>

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

\$785
\$100 discount for registration by
August 20, 2019.

Contact

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Email

registration@ncpers.org

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

Course: NFP Program

Start Date: September 11, 2019

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

End Date: September 12, 2019

Location: Toronto, Ontario, Canada

**Alternative Date(s)
& Location(s)** October 29-30, 2019, Calgary AB
Nov. 13-14, 2019, Toronto ON
Feb. 24-25, 2020, Vancouver BC

Topic Area: Board Governance & Leadership

Attendance: Open To All

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

Attend this program and gain the following benefits:

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

See the website for more information about the program.

Fees

\$2,500 CAD + tax

Application deadline:
August 8, 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/NFP-Program.aspx>

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 whose voting members include pension funds, corporate funds, other employee benefit funds, endowments and foundations with approximately \$4 trillion in assets. Its non-voting members include asset management firms with more than \$35 trillion in assets. CII is a leading voice for effective corporate governance, strong shareholder rights and vibrant, transparent and fair capital markets.

See the website for more information about the conference.

Fees

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

Contact

Michael Miller
Phone: 202.822.0800

Email

michael@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=9%2F16%2F19&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 largest asset owners across North America continue to show growing confidence in private markets as they continue to increase allocations to an array of strategies across private equity, venture capital, private debt, infrastructure and real estate. Yet, in a world where the outlook for the next ten years looks drastically different to the last ten, the need to innovate and look in new sectors in order to find good returns without taking excessive risk and stay competitive has never been more paramount.

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer to register.

Contact

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Email

kstorfer@institutionalinvestor.com

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

Conference: Delivering Alpha

Organizer: Institutional Investor and CNBC

Location: New York, New York

Start Date: September 19, 2019

End Date: September 19, 2019

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

Topic Area: Investments

Attendance: By Invitation Only

This conference is an exclusive one-day meeting bringing together the world's best-known asset managers and the largest global investors for frank discussion on high-level investment themes.

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer to register.

Contact

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Email

carolyn.leven@iiforums.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Delivering-Alpha>

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

This conference will provide delegates with insights on the latest strategies for managing a dynamic emerging markets program. Attendees will gain access to the latest trends in emerging market investing and learn from those who have successfully navigated in these often volatile and uncertain regions. Topics include:

- Which markets hold the best potential for success?
- What's the role of manager selection and should you be Investing by region, country or sector?
- What are some key points for investors to keep in mind for due diligence?
- Views on China going forward: attractive opportunities? Maturing market? Both?
- How/when to consider private investments versus public investments?
- How do you think about sizing emerging/frontier vs. the rest of your program?
- Where is the opportunity looking ahead from today?

See the website for more information about the conference.

Fees

Not 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

This conference will provide delegates with insights on the latest strategies for managing a dynamic emerging markets program. Attendees will gain access to the latest trends in emerging market investing and learn from those who have successfully navigated in these often volatile and uncertain regions. Topics include:

- Which markets hold the best potential for success?
- What's the role of manager selection and should you be Investing by region, country or sector?
- What are some key points for investors to keep in mind for due diligence?
- Views on China going forward: attractive opportunities? Maturing market? Both?
- How/when to consider private investments versus public investments?
- How do you think about sizing emerging/frontier vs. the rest of your program?
- Where is the opportunity looking ahead from today?

See the website for more information about the conference.

Fees

Not 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>

Course: Human Resources & Compensation Committee Effectiveness

Organizer: Institute of Corporate Directors

Location: Toronto, Ontario, Canada

Start Date: October 07, 2019

End Date: October 07, 2019

Alternative Date(s) & Location(s) May 11, 2020, Toronto ON
June 1, 2020, 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: September 9, 2019

Contact

Maureen Finlan
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Toll-free: 1.877.593.7741
Fax: 416.593.0636

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mfinlan@icd.ca

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

Conference: Annual Conference

Start Date: October 12, 2019

Organizer: National Council on Teacher Retirement (NCTR)

End Date: October 15, 2019

Location: Nashville, Tennessee

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

Topic Area: General

Attendance: Members Only

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

See the website for more information about the conference.

Fees

\$1,300

Contact

Robyn Wheeler
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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)

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). 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. Topics covered will include:

- Current Issues in US Corporate Governance – What International Investors Need to Know
- Climate Change Risk: Priorities, Protection and Practices
- The Rise of Passive Investment: Consequences for Corporate Governance
- Human Capital Management – Best Practices and Investor Insights
- Fixed Income: The role of the creditor in governance and stewardship
- Integrating ESG into Executive Compensation Plans
- Revitalising the Investment Imperative in Latin America

See the website for more information about the conference.

Fees

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

Contact

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Head of Communications & Events
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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: Atlanta, Georgia

**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. While the movement toward pension risk transfer has accelerated, there are still pension funds that either are not ready or choose to maintain their funds and manage risk with a liability driven investing strategy. This conference will provide actionable information for developing, implementing and managing pension risk no matter the strategy chosen.

See the website for more information about the conference.

Fees

Not 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.

See the website for more information about the conference.

Fees

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

Contact

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

Email

amy@prea.org

Link: <https://fall.prea.org/>

Conference: Roundtable for Consultants & Institutional Investors

Start Date: October 16, 2019

Organizer: Institutional Investor

End Date: October 18, 2019

Location: Chicago, Illinois

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

Topic Area: Investments

Attendance: By Invitation Only

This Roundtable will look ahead to the future and examine the implicit - or explicit - bets that institutional investors have made on diversification, factor investing, regulatory reform, or portable alpha.

See the website for more information about the conference.

Fees

No fee. Limited to qualified institutional funds and investment consultants. Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

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

Conference: Talent Acquisition Conference

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: "Closing the Gap - A Focus on Your Future Workforce". As organizations adopt new technologies, org structures, and sourcing strategies, it is imperative that the talent acquisition function also evolves. Continuous changes to the way business is done means that the talent acquisition strategy must also adapt to find and compete for the right candidates—people who will succeed today and into the future. 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.

A pre-conference seminar on The Challenges of and Solutions to Labor Shortages, the day before the conference, is available for an additional fee of \$795 (\$695 for members). Expert speakers and practitioners will describe the labor shortages problem, but focus on how companies are, or should be, dealing with it.

See the website for more information about the conference.

Fees

\$2,895 - non-members
\$2,395 - members

Contact

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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.

See the website for more information about the conference.

Fees

\$1,595 - non-members
\$1,295 - CFA members
\$200 discount for registration by
September 17, 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>

Course: Audit Committee Effectiveness

Start Date: October 17, 2019

Organizer: Institute of Corporate Directors

End Date: October 17, 2019

Location: Calgary, Alberta, Canada

**Alternative Date(s)
& Location(s)** November 7, 2019, Toronto ON
December 12, 2019, Toronto ON
January 20, 2020, Ottawa ON

Topic Area: Board Governance & Leadership

Attendance: Open To All

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

See website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: September
19, 2019

Contact

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Fax: 416.593.0636

Email

mfinlan@icd.ca

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

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

\$825

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: Members Only

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.

This conference, themed "Achieving the Gold Standard", includes a pre-conference on creating effective visuals using common Microsoft tools to be conducted by David Paradi. The conference will include a comprehensive array of general sessions on topics ranging from communications to ethics. It will also include an optional tour of the Utah Retirement System at no additional charge.

See the website for more information about the conference.

Fees

\$525

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.

See the website for more information about the conference.

Fees

\$1,735 - non-members
\$1,430 - members
\$300 discount for registration by
September 13, 2019

Contact

Phone: 703.516.9300
Fax: 703.516.9308

Email

customercare@asppa-net.org

Link: <http://asppaannual.org/conference/>

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 1-5, 2020, 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 2019

Organizer: Mercer

Location: Boston, Massachusetts

Start Date: October 22, 2019

End Date: October 23, 2019

Alternative Date(s) & Location(s) 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/2019/boston/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

The theme for this conference is: "Focusing on Success Strategies for 2020 and Beyond". The conference will address new and emerging executive compensation trends and the best practices which continue to change. It will discuss how companies are implementing SEC rules (e.g. Pay Ratio), improved incentive designs to ensure greater pay-for-performance alignment and much better communications as investors and other stakeholders are demanding enhanced disclosures. Other topics will include selecting performance metrics for short, medium and long-term and global issues in executive compensation, and Board of Directors compensation issues.

See the website for more information about the conference.

Fees

\$2,895 - non-members
\$2,395 - members

Contact

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

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=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)** N/A

Topic Area: General

Attendance: Members Only

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

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

info@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=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 9-10, 2020, Las Vegas NV

Topic Area: Board Governance & Leadership

Attendance: Members Only

This is a trustee 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
October 4, 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

Last year's fees: \$815
\$100 discount for registration by
October 4, 2019

Contact

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

Email

registration@ncpers.org

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

Conference: Alternatives Conference

Start Date: October 28, 2019

Organizer: The Pension Bridge

End Date: October 29, 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/agendaalternatives2019.asp>

Conference: The Evolution of OCIO

Start Date: October 29, 2019

Organizer: Pensions & Investments

End Date: October 29, 2019

Location: Boston, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

The rapidly evolving Outsourced Chief Investment Officer (OCIO) market continues to be one of the strongest areas for growth in the investment management industry. At year end March 31, 2018, OCIO managers reported \$1.74 trillion in assets managed worldwide for institutions. However, the market has matured enough, that we are now seeing many experienced OCIO clients reviewing their current partnerships and looking to ensure that they have the right partner for their needs. There are also a growing number of new OCIO participants, with corporate DB plans an area that stands out. Many sponsors are looking to outsourcing as they wind down their plans and go into LDI mode or sell off pieces of their DB plans in pension buyouts. This conference will address the 'why' and the 'how' of the model and look to share best practices on how to implement, evaluate, benchmark and evolve for the best outcomes.

See the website for more information about the conference.

Fees

Not 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/outsourcing-cios/2019>

Course: Private Equity: Investing and Creating Value

Start Date: November 04, 2019

Organizer: The Wharton School, University of Pennsylvania

End Date: November 08, 2019

Location: Philadelphia, Pennsylvania

**Alternative Date(s)
& Location(s)** April 20-24, 2020, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program is designed for institutional investors as well as investment professionals aspiring to be better private equity managers. It will deliver the latest information about the private equity sector, while teaching the concepts investors need to know to evaluate investment opportunities in the private equity space. Session topics include:

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

See the website for more information about the program.

Fees

\$10,950
Fee includes accommodations 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

The theme for this conference is: "Innovating and Transforming in an Era of Disruption and Change". The 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

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>

Course: Audit Committee Effectiveness

Start Date: November 07, 2019

Organizer: Institute of Corporate Directors

End Date: November 07, 2019

Location: Toronto, Ontario, Canada

**Alternative Date(s)
& Location(s)** October 17, 2019, Calgary AB
December 12, 2019, Toronto ON
January 20, 2020, Ottawa ON

Topic Area: Board Governance & Leadership

Attendance: Open To All

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

See website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: October 10, 2019

Contact

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

Email

mfinlan@icd.ca

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

Conference: 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

Multi-asset strategies are often considered the Grand Slam of institutional investing given the breadth and depth of a space that, when skillfully managed, provides the potential for upside plus the protection against downside across a wide variety of market conditions. In order to aide asset owners as they navigate the landscape, actionable insights will be provided regarding the following:

- Dynamic portfolio risk management,
- Diversification and exploring the toolkit of asset classes,
- Factors, styles and managers,
- Alternative risk premia solutions: beyond stocks and bonds,
- Managing alpha vs managing beta,
- And much more!

See the conference website for more information.

Fees

Not available.
Please contact the conference organizer.

Contact

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

Email

pi-registration@pionline.com

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

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.

See the website for more information about the conference.

Fees

\$120 - system and other non-profit member
\$2,670 - non-member

Contact

Phone: 916-701-5158

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

Multi-asset strategies are often considered the Grand Slam of institutional investing given the breadth and depth of a space that, when skillfully managed, provides the potential for upside plus the protection against downside across a wide variety of market conditions. In order to aide asset owners as they navigate the landscape, actionable insights will be provided regarding the following:

- Dynamic portfolio risk management,
- Diversification and exploring the toolkit of asset classes,
- Factors, styles and managers,
- Alternative risk premia solutions: beyond stocks and bonds,
- Managing alpha vs managing beta,
- And much more!

See the conference website for more information.

Fees

Not available.
Please contact the conference organizer.

Contact

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

Email

pi-registration@pionline.com

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

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.

See the website for more information about the conference.

Fees

\$1,395 - non-members
\$1,195 - CFA members
\$300 discount for registration by
October 11, 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/equity-2019>

Conference: Systematic Investment Strategies Symposium

Start Date: November 19, 2019

Organizer: Institutional Investor

End Date: November 20, 2019

Location: Apella, New York

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

Topic Area: Investments

Attendance: By Invitation Only

Is the future of systematic investing changing? Or, not really? Having navigated through a rough 2018 and as we continue into an uncertain 2019, what are some of the lessons learned and challenges faced by institutional allocators interested in systematic strategies? Stakeholders have high expectations and remain hugely invested in the space, but has the potential for these strategies changed as the macro environment shifts? This Symposium will assess the ways that pension funds, endowments, and foundations are increasingly employing systematic investment strategies to meet their investment objectives.

See the website for more information about the conference.

Fees

No fee. Limited to senior investment executives from larger institutional funds. Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Systematic-Investment-Strategies-Symposium>

Conference: RI New York

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
Events Leader, Americas
Phone: +44 20 7680 7162

Email

hamish@responsible-investor.com

Link: https://www.responsible-investor.com/events/events_page/ri_new_york_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: By Invitation Only

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

Complimentary for institutional investors and government agencies. Please contact conference organizer.

Contact

Phone: +44 (0)20 7775 6653

Email

ftlive@ft.com

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

Conference: Employee Financial Well-Being Conference

Start Date: December 05, 2019

Organizer: The Conference Board

End Date: December 06, 2019

Location: Dallas, Texas

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

Topic Area: Human Resources

Attendance: Open To All

Employee "financial precarity" – the persistent feeling of worry about money - is on the rise due to many factors, including rising healthcare and education costs, market volatility, retirement savings practices, fear of job loss, debt, and lack of financial education and planning. This conference will examine the social and economic impact of employee financial precarity at all levels and what progressive employers are doing to address this critical and emerging problem. It will explore a range of issues including:

- research behind the trends including financial and economic costs
- employee lifecycle planning and generational needs
- assessment and privacy issues
- program measurement and analytics tools
- gender and diversity dimensions
- role of technology and Artificial Intelligence
- insights and solutions from behavioural economics

See website for more information about the conference.

Fees

\$2,195 - non-members
\$1,995 - 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=3021>

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) Apr. 27 - May 1, 2020, 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>

Course: Audit Committee Effectiveness

Start Date: December 12, 2019

Organizer: Institute of Corporate Directors

End Date: December 12, 2019

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) October 17, 2019, Calgary AB
November 7, 2019, Toronto ON
January 20, 2020, Ottawa ON

Topic Area: Board Governance & Leadership

Attendance: Open To All

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

See website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: October 10, 2019

Contact

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

Email

mfinlan@icd.ca

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

Course: Audit Committee Effectiveness

Start Date: January 20, 2020

Organizer: Institute of Corporate Directors

End Date: January 20, 2020

Location: Ottawa, Ontario, Canada

Alternative Date(s) & Location(s) October 17, 2019, Calgary AB
November 7, 2019, Toronto ON
December 12, 2019, Toronto ON

Topic Area: Board Governance & Leadership

Attendance: Open To All

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

See website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: October 10, 2019

Contact

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

Email

mfinlan@icd.ca

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

Conference: 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: Emerging Markets Forum

Start Date: February 11, 2020

Organizer: Institutional Investor

End Date: February 12, 2020

Location: Marina Del Rey, California

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

Topic Area: Investments

Attendance: By Invitation Only

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

More information about the conference is not yet available.

Fees

No fee. Registration limited to “qualified representatives” of institutional investors. Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Emerging-Markets-Forum>

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.

More information about the conference is not yet available.

Fees

Not yet available.
Fall 2019 conference 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/>

The Cortex Report prepared for the San José Retirement Boards

Conference: General Assembly**Start Date:** March 07, 2020**Organizer:** California Association of Public Retirement Systems (CALAPRS)**End Date:** March 10, 2020**Location:** Rancho Mirage, California**Alternative Date(s)
& Location(s)** N/A**Topic Area:** General**Attendance:** Members Only

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

The General Assembly is an educational conference for retirement system trustees, senior staff, and annual sponsors of CALAPRS.

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

info@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1229976&group=>

Conference: Spring Conference**Start Date:** March 09, 2020**Organizer:** Council of Institutional Investors**End Date:** March 11, 2020**Location:** Washington, District of Columbia**Alternative Date(s)
& Location(s)** N/A**Topic Area:** Corporate Governance**Attendance:** Members Only

The Council of Institutional Investors (CII) is a nonprofit, nonpartisan association whose voting members include pension funds, corporate funds, other employee benefit funds, endowments and foundations with approximately \$4 trillion in assets. Its non-voting members include asset management firms with more than \$35 trillion in assets. CII 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.
Please contact the conference organizer to become a member and register.

Contact

Michael Miller
Phone: 202.822.0800

Email

michael@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=3/9/2020&eventid=47

Course: Mobilizing Your Nonprofit Board

Start Date: March 09, 2020

Organizer: Harvard Kennedy School, Harvard University

End Date: May 08, 2020

Location: Cambridge, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

This course will provide you with the practical skills and conceptual frameworks that will help you lead more engaged boards. It is online program organized around a conceptual framework for overcoming the “micro-governing” that so often leads to low-value, high-maintenance boards. It will help you understand how both all parties can reframe their work to support more effective and consequential governance.

The program explores four key topics:

- Key concepts of governance as leadership
- Identifying and responding to practice challenges
- Simulation: case study of a difficult board situation
- The challenge for executive leaders

See the website for more information about the program.

Fees

\$2,200

Application deadline:
February 9, 2020

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

Link: <https://www.hks.harvard.edu/educational-programs/executive-education/mobilizing-your-nonprofit-board>

Conference: Spring Conference

Start Date: March 22, 2020

Organizer: Journal of Investment Management

End Date: March 24, 2020

Location: San Diego, California

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

Topic Area: Investments

Attendance: Members Only

This conference is titled Asset Allocation & Supporting Risk Analysis. Asset allocation is arguably the most important activity in the management of a portfolio. The conference will feature presentations on some of the state of the art analyses which supports the asset allocation function by the pioneers of the field. This event is co-sponsored with Invesco and the Rady School of Management, University of California San Diego. Featured presenters:

Harry Markowitz, Keynote Speaker

Richard Bookstaber

Andrew Lo, MIT Sloan School of Management

Vineer Bhansali, LongTail Alpha

Mark Kritzman, Windham Capital Management

Marty Leibowitz, Morgan Stanley

Nick Savoulides, Invesco

Ross Valkanov, University of California San Diego

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: Private Equity: Investing and Creating Value

Start Date: April 20, 2020

Organizer: The Wharton School, University of Pennsylvania

End Date: April 24, 2020

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Nov. 4-8, 2019, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program is designed for institutional investors as well as investment professionals aspiring to be better private equity managers. It will deliver the latest information about the private equity sector, while teaching the concepts investors need to know to evaluate investment opportunities in the private equity space. Session topics include:

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

See the website for more information about the program.

Fees

\$11,280

Fee includes accommodations and meals.

Contact

Phone: 215.898.1776

Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Course: Venture Capital

Start Date: April 27, 2020

Organizer: The Wharton School, University of Pennsylvania

End Date: May 01, 2020

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Dec. 8-12, 2019, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program will discuss how venture capital 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

\$11,350

Fee includes lodging and meals.

Contact

Phone: 215.898.1776

Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference: Public Funds Roundtable

Start Date: April 29, 2020

Organizer: Institutional Investor

End Date: May 01, 2020

Location: Los Angeles, California

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

Topic Area: Investments

Attendance: By Invitation Only

The current environment is one of high anxiety – socially and in many cases economically. The fabric of geopolitical unity is in tatters, equity markets act of their own volition, credit quality is of increased concern, emerging markets continue to be challenged, and the world prepares for slowed growth. All the while, U.S. public plans continue to fight an uphill battle against their funded statuses. However, that doesn't mean there isn't room for cautious optimism in public pension investing. Governance can be altered. Allocators can leverage relationships for mutual benefit. New paradigms of investment opportunity are emerging. As market cycles shift, there is an increased opportunity along with increased risk. This roundtable will address the means through which you can hack your portfolio, expose ascending and descending trends, and challenge conventional wisdom to gain an edge.

More information about the conference is not yet available.

Fees

Not available. Limited to "investment executives" from pension funds. Please contact the conference organizer.

Contact

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

Email

kstorfer@institutionalinvestor.com

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

Conference: Trustee Education Seminar

Start Date: May 09, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 10, 2020

Location: Las Vegas, Nevada

**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.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's 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 09, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 10, 2020

Location: Las Vegas, Nevada

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

Not yet available.
October 2019 fees:
\$1,020 - for two modules
\$205 discount for early
registration.

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 09, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 10, 2020

Location: Las Vegas, Nevada

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.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's 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 10, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 13, 2020

Location: Las Vegas, Nevada

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

Topic Area: General

Attendance: Members Only

More than 1,000 trustees, administrators, state and local officials, investment, financial and union officers, pension staff and regulators attend this conference each year. Attendees benefit from the comprehensive educational programming, dynamic speakers, and networking opportunities with money managers, investment service providers and public fund colleagues from across the nation.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's 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 11, 2020

Organizer: Institute of Corporate Directors

End Date: May 11, 2020

Location: Toronto, Ontario, Canada

**Alternative Date(s)
& Location(s)** October 7, 2019, Toronto ON
June 1, 2020, 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: Spring Conference

Start Date: May 12, 2020

Organizer: State Association of County Retirement Systems (SACRS)

End Date: May 15, 2020

Location: San Diego, 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
Registration opens Jan 2020.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Conference: Annual Conference

Start Date: May 17, 2020

Organizer: CFA Institute

End Date: May 20, 2020

Location: Atlanta, Georgia

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

Topic Area: Investments

Attendance: Open To All

The conference is the investment industry's largest and longest-running educational gathering of investment professionals, attracting as many as 2,000 delegates from 70 countries and territories in recent years.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

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

Email

program@cfainstitute.org

Link: <https://www.cfainstitute.org/en/events/conferences/annual-2020>

Course: Investment Strategies and Portfolio Management

Start Date: June 01, 2020

Organizer: The Wharton School, University of Pennsylvania

End Date: June 05, 2020

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

\$11,280

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: Human Resources & Compensation Committee Effectiveness

Start Date: June 01, 2020

Organizer: Institute of Corporate Directors

End Date: June 01, 2020

Location: Calgary, Alberta, Canada

Alternative Date(s) & Location(s) October 7, 2019, Toronto ON
May 11, 2020, Toronto ON

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: May 4, 2020.

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: ICGN Toronto Conference

Start Date: June 09, 2020

Organizer: International Corporate Governance Network (ICGN)

End Date: June 11, 2020

Location: Toronto, Ontario, Canada

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

Topic Area: Corporate Governance

Attendance: Members Only

This conference will be hosted by the Ontario Teachers Pension Plan.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

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

Email

elizabeth.thomas@icgn.org

Link: <https://www.icgn.org/events/future-icgn-events>

Conference: Summer Roundtable

Start Date: July 15, 2020

Organizer: Pacific Pension Institute

End Date: July 17, 2020

Location: Vancouver, Canada

**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

More information about the conference is not yet available.

Fees

Not available.
Please contact the conference organizer.

Contact

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

Email

info@ppi.institute

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

Conference: Annual Conference

Start Date: August 08, 2020

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: August 12, 2020

Location: Park City, Utah

**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>

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