



The Cortex Report

Customized for the

San José Retirement Boards

November 2019

FCERS 10-17-19

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Introduction to The Cortex Report

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

Education events are sorted in chronological areas, 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 preparing 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.

The Cortex Report does not at this time include education events sponsored by investment consultants or investment managers.

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Sep 30, 2020	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Boston	25	<i>New</i>

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Oct 10, 2020	National Council on Teacher Retirement (NCTR)	Annual Conference	La Jolla	26	<i>New</i>
Oct 25, 2020	Public Pension Financial Forum (P2F2)	Annual Conference	Salt Lake City	26	<i>New</i>

Event Listings

The Cortex Report prepared for the San José Retirement Boards

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

Fees include accommodations and meals.

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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

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

The Cortex Report prepared for the San José Retirement Boards

Conference: University of Virginia Investing Conference
Organizer: Darden School of Business, University of Virginia
Location: Charlottesville, Virginia

Start Date: November 07, 2019

End Date: November 08, 2019

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

Topic Area: Investments

Attendance: Open To All

For more than a decade, this conference has gathered leading industry practitioners and Darden leadership to provide unique industry insights. The conference, held annually on Darden's Grounds, is hosted by the Richard A. Mayo Center for Asset Management. This year, UVIC will focus attention on the future of alpha for various asset classes and investment strategies. Program speakers will discuss their latest research, what they are expecting across markets, and how investors might position themselves for success in a challenging investment environment.

See the conference website for more information.

Fees

\$375

Contact

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Coordinator
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SwingS@arden.virginia.edu

Link: <https://www.darden.virginia.edu/uvic>

Course: Audit Committee Effectiveness
Organizer: Institute of Corporate Directors
Location: Toronto, Ontario, Canada

Start Date: November 07, 2019

End Date: November 07, 2019

Alternative Date(s) & Location(s) December 12, 2019, Toronto ON
January 20, 2020, Ottawa ON
March 23, 2020, Halifax NS

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
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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. But where do multi-asset strategies ideally fit into an institutional portfolio and how are investors positioning their plans to negotiate what markets have to offer? Most importantly, will a larger number of active managers stand out who possess greater skill and experience, or will they merely serve to create additional complexity and expense? 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://conferences.pionline.com/conference/multi-asset/2019>

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

Start Date: November 14, 2019

Organizer: Pensions & Investments

End Date: November 14, 2019

Location: New York, New York

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

Topic Area: Investments

Attendance: Open To All

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. But where do multi-asset strategies ideally fit into an institutional portfolio and how are investors positioning their plans to negotiate what markets have to offer? Most importantly, will a larger number of active managers stand out who possess greater skill and experience, or will they merely serve to create additional complexity and expense? 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

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Link: <https://conferences.pionline.com/conference/multi-asset/2019>

Conference: Equity Research and Valuation

Start Date: November 14, 2019

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

End Date: November 15, 2019

Location: New York, New York

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

Topic Area: Investments

Attendance: Open To All

This conference aims to keep investment managers abreast of the latest advances and developments in equity research techniques, valuation, and portfolio management. The application of new technologies in portfolio management will be a key theme for the conference, and speakers will discuss such topics as the use of artificial intelligence, data analytics, and quantitative techniques in investment decision making and how blockchain could disrupt a number of industries, including financial services. Topics for discussion will include valuation approaches and analysis, global investment strategies, research methods, how to better understand and analyze portfolio risks, and the top challenges equity investors face today.

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

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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. Registration limited to senior investment executives from larger institutional funds. Please contact the conference organizer to register.

Contact

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kstorfer@institutionalinvestor.com

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

Course: Principles of Global Macro

Start Date: December 02, 2019

Organizer: BCA Research - Approved by the CFA Institute

End Date: December 02, 2019

Location: Miami, Florida

**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. Participants of its courses learn techniques that will enable them to interpret data and important economic developments from the perspective of an investment professional. This seminar will help you better assess macro risks and opportunities. You will:

- Focus on the analytical methods and investment strategies developed for macroeconomics, sector analysis and quantitative modelling.
- Learn techniques that will enable you to interpret data and important economic developments
- Explore how movements in certain assets can influence returns in other financial assets.
- Look at important and interesting questions, such as why a strong currency implies lower bond yields, and how lower interest rates can boost equity multiples.
- Gain accessible methods that are critical to understanding how markets work.

See the website for more information about the program.

Fees

Not yet available.
Previous course fee: \$3,795

Contact

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

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academy@bcaresearch.com

Link: <https://interactive.bcaresearch.com/academy/principles-of-macroeconomics-719PC-4670ZC.html?>

Conference: RI New York

Organizer: Responsible Investor

Location: New York, New York

Start Date: December 04, 2019

End Date: December 05, 2019

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

Topic Area: Investments

Attendance: Open To All

This conference will provide a forum for investors to debate shareholder rights and proxy access, the role of central banks and securities regulators in climate risk, the importance of transforming energy systems, the impact of technologies like AI and machine learning on investor portfolios, requirements for data privacy, and ways to include human rights and other governance factors into investment portfolios. It provides a unique opportunity to learn, share and debate on responsible investment issues with 600+ 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.

See the website for more information about the conference.

Fees

No charge for asset owner and investment consultants.

Contact

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Events Leader, Americas
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hamish@responsible-investor.com

Link: <https://www.eiseverywhere.com/ehome/462192?&t=2b5eabdb4d49adb687f039380e88d0f4>

Conference: Investing for Good USA

Organizer: Financial Times (FT)

Location: New York, New York

Start Date: December 05, 2019

End Date: December 05, 2019

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

Topic Area: Investments

Attendance: 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>

The Cortex Report prepared for the San José Retirement Boards

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
- insights and solutions from behavioural economics
- employee lifecycle planning and generational needs
- employee needs assessment and how to enhance employee experience
- program measurement, development, and analytics tools
- gender and diversity dimensions
- role of technology and Artificial Intelligence

See website for more information about the conference.

Fees

\$2,195 - non-members
\$1,995 - members

Contact

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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
Fees include meals but not accommodations.

Contact

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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) November 7, 2019, Toronto ON
January 20, 2020, Ottawa ON
March 23, 2020, Halifax NS

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

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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) November 7, 2019, Toronto ON
December 12, 2019, Toronto ON
March 23, 2020, Halifax NS

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

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Email

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

The Cortex Report prepared for the San José Retirement Boards

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.

See the website for more information about the conference.

Fees

Not yet available.
2019 fees: \$600

Contact

Alyssa Carlson
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Fax: 202-624-1439

Email

registration@ncpers.org

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

Conference: Risk & Liquidity Forum

Start Date: January 28, 2020

Organizer: Institutional Investor

End Date: January 29, 2020

Location: San Francisco, California

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

Topic Area: Investments

Attendance: By Invitation Only

This conference will present the latest, best thinking on the ways that North American pension funds and US endowments and foundations can respond to a volatile global investment landscape. Historically, the forum has always strived to be about both risk AND liquidity. So far, 2020 is shaping up to be the year of focusing on liquidity. Not entirely so, but definitely predominantly. There are several reasons for this, including the massive shift by institutional allocators to all sorts of private markets strategies.

See the website for more information about the conference.

Fees

No fee.
Please contact the conference organizer to register.

Contact

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Fax: (212) 224-3802

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Risk-Liquidity-Forum>

Course: Board Oversight of Strategy

Start Date: February 04, 2020

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

End Date: February 04, 2020

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) February 26, 2020, Calgary AB
June 8, 2020, Toronto ON

Topic Area: Board Governance & Leadership

Attendance: Open To All

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

See the website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: January 7, 2020

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
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Fax: 416.593.0636

Email

mfinlan@icd.ca

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

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

When it comes to their emerging markets portfolios, many institutional investors have largely set the strategy – set the course, if you will – and have remained fairly consistent with their overall strategic allocations to specific sectors, regions, and asset classes. But now many investors are seeking to dissect those portfolios, examine the constituent components, and identify and assess ways to add diversification and robustness.

This conference is going to focus on exactly that: What specifically do you need to make your emerging markets strategy better?

More information about the conference is not yet available.

Fees

No fee. Registration limited to "qualified representatives". 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: Global Real Assets Investment Forum

Start Date: February 25, 2020

Organizer: Institutional Investor

End Date: February 26, 2020

Location: Austin, Texas

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

Topic Area: Investments

Attendance: By Invitation Only

Investments in real assets have continued to increase over the past few year and the trend is predicted to continue as investors look to diversify their portfolios as inflation heats up and markets continue to be volatile. With trade wars and the 2020 US elections, this could be the best time to look at the potential for real assets investments outside the US. But investors are looking for returns with minimal risks.

This conference will explore these and other issues.

More information about the conference is not yet available.

Fees

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

Course: Board Oversight of Strategy

Start Date: February 26, 2020

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

End Date: February 26, 2020

Location: Calgary, Alberta, Canada

**Alternative Date(s)
& Location(s)** February 4, 2020, Toronto ON
June 8, 2020, Toronto ON

Topic Area: Board Governance & Leadership

Attendance: Open To All

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

See the website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: January 29, 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: <https://www.icd.ca/Courses/Short-Courses/Board-Oversight-of-Strategy.aspx>

Course: NFP Program

Start Date: March 02, 2020

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

End Date: March 03, 2020

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) Nov. 13-14, 2019, Toronto ON
Feb. 24-25, 2020, Vancouver BC
March 30-31, 2020, Edmonton AB

Topic Area: Board Governance & Leadership

Attendance: Open To All

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

Attend this program and gain the following benefits:

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

See the website for more information about the program.

Fees

\$2,500 CAD + tax
Application deadline: January 30, 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/NFP-Program.aspx>

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.
Last year's conference fees:
\$525 - non-member
\$150 - member

Contact

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

Email

amy@prea.org

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

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

Conference: Talent Management Strategies Conference

Start Date: March 19, 2020

Organizer: The Conference Board

End Date: March 20, 2020

Location: New York, New York

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

Topic Area: Human Resources

Attendance: Open To All

This conference will be driven by insights from innovators disrupting the nature of work, leadership development, succession planning, what it means to be digital, and much more. It will be an interactive summit in which every participant shares challenges and advancements.

More information about the conference is not yet available.

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=3073>

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
\$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: Audit Committee Effectiveness

Start Date: March 23, 2020

Organizer: Institute of Corporate Directors

End Date: March 23, 2020

Location: Halifax, Nova Scotia, 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: February 20, 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/Audit-Committee-Effectiveness.aspx>

Course: Advanced Principles of Pension Management for Trustees

Start Date: March 30, 2020

Organizer: CALAPRS - In association with UCLA Anderson School of Business

End Date: April 01, 2020

Location: Los Angeles, California

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

Topic Area: General

Attendance: Members Only

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

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

register@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1276553&group=>

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

Fees include 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

Fees include 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. Registration limited to investment executives from pension 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-Conferences/Public-Funds-Roundtable>

Conference: Leadership Development Conference

Start Date: April 30, 2020

Organizer: The Conference Board

End Date: May 01, 2020

Location: New York, New York

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

Topic Area: Human Resources

Attendance: Open To All

This conference will explore the impact of marketplace and business strategy as key contexts in establishing a leadership development strategy. Discover research-based insights for aligning talent development practices to culture initiatives, as well as techniques that reinforce resiliency, agility, and adaptability in leaders. Learn about the latest “high touch” and “high tech” solutions for growing a broad and deep pipeline of leaders—one that aligns with overall HR and business strategies—while networking and idea-sharing with your peers from across the globe.

More information about the conference is not yet available.

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=3071>

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)** N/A

Topic Area: Board Governance & Leadership

Attendance: Members Only

This is an accreditation program specifically designed and tailored for public pension governance. It divides plan governance, oversight and administration into four modules. Each module delves into the fundamental components and strategies necessary for governing a public pension fund, allowing trustees and plan staff to walk away with the key competencies critical to their fiduciary responsibilities. Offered two modules at a time, upon completion of all four modules (in any order), participants will earn their Accredited Fiduciary (AF) designation. It is recommended that participants complete the Trustee Educational Seminar first.

Module 1 – Governance and the Board's Role
Module 2 – Investment and Finance
Module 3 – Legal, Risk Management and Communication
Module 4 – Human Capital

See the website for more information about the program.

Fees

Not yet available.
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: Program for Advanced Trustee Studies (PATs)

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>

The Cortex Report prepared for the San José Retirement Boards

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) 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)** N/A

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
Fees include 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) 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 Annual 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, in premier partnership with the Royal Bank of Canada.

Over 500 influential governance professionals will convene in Toronto to discuss developments in corporate governance from an international perspective. As the governance and investor stewardship landscape continues to evolve, our leading expert speakers will provide attendees with key insights into best practice and highlight future priorities for companies, investors and stakeholders.

More information about the conference is not yet available.

Fees

£1,100 - non-member
£800 - member

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-2020-annual-conference-toronto>

The Cortex Report prepared for the San José Retirement Boards

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: Chief Officers Summit

Start Date: July 22, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: July 24, 2020

Location: Chicago, Illinois

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

Topic Area: Board Governance & Leadership

Attendance: Open To All

More information about the conference is not yet available.

Fees

Not yet available.
Last year's 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>

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>

Course: Principles of Pension Governance for Trustees

Start Date: August 24, 2020

Organizer: CALAPRS - In association with Pepperdine University

End Date: August 27, 2020

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 Governance courses.

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

Fees

Not available. Please contact the conference organizer.

Contact

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

Email

register@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1276559&group=>

Course: Governing for Nonprofit Excellence: Critical Issues for Board

Start Date: September 09, 2020

Organizer: Harvard Business School, Harvard University

End Date: September 12, 2020

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: Annual Institutional Investor Real Estate Conference

Start Date: September 30, 2020

Organizer: Pension Real Estate Association (PREA)

End Date: October 02, 2020

Location: Boston, Massachusetts

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

Conference: Annual Conference

Start Date: October 10, 2020

Organizer: National Council on Teacher Retirement (NCTR)

End Date: October 13, 2020

Location: La Jolla, 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. NCTR membership includes 68 state, territorial, and local pension systems. These systems serve more than 19 million active and retired teachers, non-teaching personnel, and other public employees; and have combined assets of over \$2 trillion in their trust funds.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fees: \$1,300

Contact

Robyn Wheeler
Phone: (916) 509-7260

Email

rwheeler@nctr.org

Link: <https://nctr.org/upcoming-events/conference/future-conferences/>

Conference: Annual Conference

Start Date: October 25, 2020

Organizer: Public Pension Financial Forum (P2F2)

End Date: October 28, 2020

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.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's conference fees:
\$525

Contact

Phone: 614-227-0059

Email

information@p2f2.org

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

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