



# ***The Cortex Report***

**Customized for the**

**San José Retirement Boards**

**January 2020**

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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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# Table of Contents

Start Date	Organizer	Event	Location	Page	
Jan 20, 2020	Institute of Corporate Directors	Audit Committee Effectiveness	Ottawa	1	
Jan 20, 2020	International Foundation of Employee Benefit Plans (IFEBC)	Annual Health Benefits Conference & Expo	Clearwater Beach	1	New
Jan 26, 2020	National Conference on Public Employee Retirement Systems (NCPERS)	Legislative Conference	Washington	2	
Jan 28, 2020	Institutional Investor	Risk & Liquidity Forum	San Francisco	2	
Feb 04, 2020	Institute of Corporate Directors and Rotman School of Management (U of T)	Board Oversight of Strategy	Toronto	3	
Feb 10, 2020	Pension Bridge	ESG Summit	San Diego	3	New
Feb 11, 2020	Institutional Investor	Emerging Markets Forum	Marina Del Rey	4	
Feb 25, 2020	Institutional Investor	Global Real Assets Investment Forum	Austin	4	
Feb 26, 2020	Institute of Corporate Directors and Rotman School of Management (U of T)	Board Oversight of Strategy	Calgary	5	
Feb 29, 2020	National Association of State Retirement Administrators (NASRA)	Winter Meeting	Washington	5	
Mar 02, 2020	National Institute on Retirement Security (NIRS)	Annual Conference	Washington	6	New
Mar 02, 2020	Institute of Corporate Directors and Rotman School of Management (U of T)	NFP Program	Toronto	6	
Mar 04, 2020	Pension Real Estate Association (PREA)	PREA Spring Conference	Beverly Hills	7	
Mar 04, 2020	Private Equity International	Responsible Investment Forum	New York	7	New
Mar 07, 2020	California Association of Public Retirement Systems (CALAPRS)	General Assembly	Rancho Mirage	8	
Mar 09, 2020	Council of Institutional Investors	Spring Conference	Washington	8	
Mar 19, 2020	The Conference Board	Talent 2020	New York	9	
Mar 22, 2020	Journal of Investment Management	Spring Conference	San Diego	9	
Mar 23, 2020	Institute of Corporate Directors	Audit Committee Effectiveness	Halifax	10	
Mar 24, 2020	Pensions & Investments	Fixed Income & Credit	Dallas	10	New
Mar 26, 2020	Pensions & Investments	Fixed Income & Credit	New York	11	New
Mar 30, 2020	CALAPRS - In association with UCLA Anderson School of Business	Advanced Principles of Pension Management for Trustees	Los Angeles	11	
Apr 08, 2020	Institute of Corporate Directors	Audit Committee Effectiveness	Vancouver	12	New
Apr 14, 2020	Pension Bridge	Pension Bridge Annual	San Francisco	12	New
Apr 14, 2020	Institute of Corporate Directors	Audit Committee Effectiveness	Winnipeg	13	New

# Table of Contents

Start Date	Organizer	Event	Location	Page	
Apr 19, 2020	Public Retirement Information Systems Management (PRISM)	Annual Conference	Atlanta	13	<i>New</i>
Apr 20, 2020	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia	14	
Apr 20, 2020	Wharton School, University of Pennsylvania - for the IFEBP	Portfolio Concepts and Management	Philadelphia	14	<i>New</i>
Apr 21, 2020	Plan Sponsor	Chief Investment Officer Summit	New York	15	<i>New</i>
Apr 27, 2020	The Wharton School, University of Pennsylvania	Venture Capital	Philadelphia	15	
Apr 29, 2020	Institutional Investor	Public Funds Roundtable	Los Angeles	16	
Apr 30, 2020	The Conference Board	Leadership Development Conference	New York	16	
May 04, 2020	International Foundation of Employee Benefit Plans (IFEBP)	Washington Legislative Update	Washington	17	<i>New</i>
May 07, 2020	Pension Research Council, The Wharton School	Managing Longevity Risk: New Public/Private Perspectives	Philadelphia	17	<i>New</i>
May 09, 2020	National Conference on Public Employee Retirement Systems (NCPERS)	Trustee Education Seminar	Las Vegas	18	
May 09, 2020	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	Las Vegas	18	
May 09, 2020	National Conference on Public Employee Retirement Systems (NCPERS)	Program for Advanced Trustee Studies (PATs)	Las Vegas	19	
May 10, 2020	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference and Exhibition	Las Vegas	19	
May 11, 2020	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Toronto	20	
May 12, 2020	State Association of County Retirement Systems (SACRS)	Spring Conference	San Diego	20	
May 17, 2020	CFA Institute	Annual Conference	Atlanta	21	
May 17, 2020	Government Finance Officers Association (GFOA)	Annual Conference	New Orleans	21	<i>New</i>
May 31, 2020	International Centre for Pension Management (ICPM)	Discussion Forum	Toronto	22	
Jun 01, 2020	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia	22	
Jun 01, 2020	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Calgary	23	
Jun 04, 2020	The Conference Board	Leadership Development Conference	Chicago	23	<i>New</i>
Jun 08, 2020	Plan Sponsor	Plan Sponsor National Conference	Orlando	24	<i>New</i>
Jun 08, 2020	Institute of Corporate Directors and Rotman School of Management (U of T)	Board Oversight of Strategy	Toronto	24	
Jun 09, 2020	International Corporate Governance Network (ICGN)	Annual Conference	Toronto	25	
Jun 29, 2020	International Foundation of Employee Benefit Plans (IFEBP)	Public Employee Benefits Institute	San Francisco	25	<i>New</i>

# Table of Contents

Start Date	Organizer	Event	Location	Page	
Jul 15, 2020	Pacific Pension Institute	Summer Roundtable	Vancouver	26	
Jul 19, 2020	National Council on Teacher Retirement (NCTR)	Trustee Workshop	Berkeley	26	<i>New</i>
Jul 20, 2020	Wharton School, University of Pennsylvania - for the IFEBP	Alternative Investment Strategies	San Francisco	27	<i>New</i>
Jul 20, 2020	CFA Institute - Hosted by CFA Society Chicago	CFA Institute Seminar for Global Investors	Chicago	27	<i>New</i>
Jul 22, 2020	National Conference on Public Employee Retirement Systems (NCPERS)	Chief Officers Summit	Chicago	28	<i>New</i>
Jul 26, 2020	SACRS & Haas School of Business, UC Berkeley	Public Pension Investment Management Program	Berkeley	28	<i>New</i>
Jul 27, 2020	Pension Bridge	Private Equity Exclusive	Chicago	29	<i>New</i>
Aug 08, 2020	National Association of State Retirement Administrators (NASRA)	Annual Conference	Park City	29	
Aug 25, 2020	CALAPRS - In association with Pepperdine University	Principles of Pension Governance for Trustees	Malibu	30	
Sep 09, 2020	Harvard Business School, Harvard University	Governing for Nonprofit Excellence: Critical Issues for Board Leadership	Cambridge	30	
Sep 15, 2020	Pensions & Investments	Retirement Income	San Francisco	31	<i>New</i>
Sep 17, 2020	Pensions & Investments	Retirement Income	New York	31	<i>New</i>
Sep 21, 2020	Council of Institutional Investors	Fall Conference	San Francisco	32	<i>New</i>
Sep 22, 2020	International Foundation of Employee Benefit Plans (IFEBP)	Certificate of Achievement in Public Plan Policy - Part I	Santa Monica	32	<i>New</i>
Sep 24, 2020	International Foundation of Employee Benefit Plans (IFEBP)	Certificate of Achievement in Public Plan Policy - Part II	Santa Monica	33	<i>New</i>
Sep 29, 2020	Pensions & Investments	Global Markets	Chicago	33	<i>New</i>
Sep 30, 2020	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Boston	34	
Oct 01, 2020	Pensions & Investments	Global Markets	New York	34	<i>New</i>
Oct 10, 2020	National Council on Teacher Retirement (NCTR)	Annual Conference	La Jolla	35	
Oct 13, 2020	Pensions & Investments	Managing Pension Risk & Liabilities	Dallas	35	<i>New</i>
Oct 15, 2020	CFA Institute - Hosted with the CFA Society Boston	Fixed Income Management	Boston	36	<i>New</i>
Oct 15, 2020	Pensions & Investments	Managing Pension Risk & Liabilities	Atlanta	36	<i>New</i>
Oct 17, 2020	National Pension Education Association (NPEA)	Annual Conference	Seattle	37	<i>New</i>
Oct 19, 2020	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia	37	<i>New</i>
Oct 20, 2020	Pensions & Investments	Managing Pension Risk & Liabilities	New York	38	<i>New</i>

# Table of Contents

Start Date	Organizer	Event	Location	Page	
Oct 25, 2020	Public Pension Financial Forum (P2F2)	Annual Conference	Philadelphia	38	
Oct 25, 2020	American Society of Pension Professionals & Actuaries (ASPPA)	Annual Conference	Chicago	39	<i>New</i>
Oct 26, 2020	Pension Bridge	Alternatives Conference	Chicago	39	<i>New</i>
Nov 04, 2020	Pensions & Investments	The Evolution of OCIO	Boston	40	<i>New</i>
Nov 08, 2020	International Centre for Pension Management (ICPM)	Discussion Forum	Washington	40	<i>New</i>
Nov 10, 2020	State Association of County Retirement Systems (SACRS)	Fall Conference	Indian Wells	41	<i>New</i>
Nov 14, 2020	International Foundation of Employee Benefit Plans (IFEBC)	Trustees Masters Program	Honolulu	41	<i>New</i>
Nov 15, 2020	International Foundation of Employee Benefit Plans (IFEBC)	66th Annual Employee Benefits Conference	Honolulu	42	<i>New</i>
Nov 16, 2020	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia	42	<i>New</i>
Nov 17, 2020	Pensions & Investments	Asset Allocation	Chicago	43	<i>New</i>
Nov 19, 2020	Pensions & Investments	Asset Allocation	New York	43	<i>New</i>



## ***Event Listings***

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

**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)** March 23, 2020, Halifax NS  
April 8, 2020, Vancouver BC  
April 14, 2020, Winnipeg MB

**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:** Annual Health Benefits Conference & Expo

**Start Date:** January 20, 2020

**Organizer:** International Foundation of Employee Benefit Plans (IFEBCP)

**End Date:** January 22, 2020

**Location:** Clearwater Beach, Florida

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

**Topic Area:** Healthcare

**Attendance:** Open To All

Below is a preview of the session you can expect at the 2020 program.  
Health Care Costs and Quality Measures—How to Find and Use Resources  
Case Study: Year-Round Benefits Communication Improves Employee Decision Making  
Is Functional Medicine the Future of Health Care and Solution to Chronic Illness?  
Wellness and Value-Added Benefits: No Good Deed Goes Unpunished?  
Discrimination in Employee Benefits and the Civil Rights Act?  
Case Study: Creating a Culture That is Well For Tomorrow

**Fees**

\$315

**Contact**

Phone: (888) 334-3327

**Email**

edreg@ifebcp.org

**Link:** <https://www.ifebcp.org/education/schedule/Pages/health-benefits-conference-and-expo-20g3-hbce.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.

See the website for more information about the conference.

**Fees**

\$615  
\$100 discount for registration by  
January 8, 2020

**Contact**

Alyssa Carlson  
Phone: 202-624-1456  
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. Topics include:

- The intersection of leverage and liquidity – What allocators need to know
- How would private credit behave in a crisis?
- Is there really a lack of liquidity lurking in the bond markets?
- What are investors' options for a true portfolio hedge?
- Risk modeling for private markets strategies
- Managing investment risk – the operational perspective
- Increasing returns by reducing overall volatility in your portfolio
- Considering the value of strategies which automatically rebalance
- Manager selection for illiquid asset

See the website for more information about the conference.

**Fees**

No fee.  
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/Risk-Liquidity-Forum>

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

**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  
Toll-free: 1.877.593.7741  
Fax: 416.593.0636

### Email

mfinlan@icd.ca

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

**Conference:** ESG Summit

**Start Date:** February 10, 2020

**Organizer:** Pension Bridge

**End Date:** February 11, 2020

**Location:** San Diego, California

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

**Topic Area:** Investments

**Attendance:** Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together attendees from North America's largest investors and global asset managers, its conferences offer an intimate environment to strengthen relationships, discuss market trends and challenges, and refresh your knowledge of the investment industry.

With research showing a growing number of institutional investors incorporating ESG factors into their decision making, and a broad range of tactics being applied across asset classes, this summit will debate the evolving best practices being developed. It will provide a forum to engage senior professionals with investors at all stages of their ESG journey, from those that have developed detailed action plans, to investors increasingly factoring ESG into certain areas of their research, monitoring and due diligence, and those weighing up future moves.

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:** <https://www.pensionbridge.com/esg>

**Conference:** Emerging Markets Forum

**Organizer:** Institutional Investor

**Location:** Marina Del Rey, California

**Start Date:** February 11, 2020

**End Date:** February 12, 2020

**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

**Organizer:** Institutional Investor

**Location:** Austin, Texas

**Start Date:** February 25, 2020

**End Date:** February 26, 2020

**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. Topics under consideration for this conference include:

- How can you shift your real assets portfolio to being more defensive?
- The geographies and sectors to explore for emerging opportunities in real assets investing
- If inflation were to stir, which real assets will get hurt the worst?
- Are real assets investors just yield players?
- Is the PE energy model challenged?
- Uncovering dislocated opportunities in real assets
- What do public markets real asset strategies offer anymore?
- The growing reputational risks associated with some real assets investing
- Public v. private real estate: Where are the opportunities?

See the website for more information about the conference.

**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>

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

**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>

**Conference:** Winter Meeting

**Start Date:** February 29, 2020

**Organizer:** National Association of State Retirement Administrators (NASRA)

**End Date:** March 02, 2020

**Location:** Washington, District of Columbia

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

**Topic Area:** General

**Attendance:** Members Only

The winter meeting of NASRA retirement system directors and staff is held typically the last weekend in February or the first weekend in March, in Washington, DC, for a Sunday afternoon of roundtable discussions and presentations. The following day, all NASRA members are invited to hear analysis, forecasts, and overviews of current federal legislative and regulatory activities.

More information about the conference is not yet available.

**Fees**

Not yet available

**Contact**

Mary Hiatte  
Tel: 202-624-1418

**Email**

mary@nasra.org

**Link:** <https://www.nasra.org/meetings>

**Conference:** Annual Conference

**Start Date:** March 02, 2020

**Organizer:** National Institute on Retirement Security (NIRS)

**End Date:** March 03, 2020

**Location:** Washington, District of Columbia

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

**Topic Area:** Pension Plan Policy

**Attendance:** Members Only

The National Institute on Retirement Security is a non-profit research and education organization established to contribute to informed policymaking by fostering a deep understanding of the value of retirement security to employees, employers, and the economy as a whole. Located in Washington, D.C., the organization has a diverse membership of organizations interested in retirement security issues such as employee benefit plans, state or local agencies that manage retirement plans, trade associations, financial services firms, and other retirement service providers.

The theme for this conference is: 2020 Vision: The Future of Retirement.

See the website for more information about the conference.

**Fees**

No charge for members.

**Contact**

Nicole Dascenzo  
Manager of Membership  
Services  
Phone: 202-457-8190

**Email**

[membership@nirsonline.org](mailto:membership@nirsonline.org)

**Link:** <https://www.nirsonline.org/events/nirs-annual-conference/>

**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)** Feb. 24-25, 2020, Vancouver BC  
March 30-31, 2020, Edmonton AB  
April 27-28, 2020, Halifax NS

**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  
Full - accepting wait list.

**Contact**

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

**Email**

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

**Link:** <http://www.icd.ca/Courses/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.

See the website for more information about the program.

**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://spring2020.prea.org/>

**Conference: Responsible Investment Forum**

**Start Date:** March 04, 2020

**Organizer:** Private Equity International

**End Date:** March 05, 2020

**Location:** New York, New York

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

**Topic Area:** Operations

**Attendance:** Members Only

This forum, held in partnership with the Principles for Responsible Investment (PRI), brings together sophisticated LPs, GPs and private equity associations to discuss why, when, and how your firm should be implementing an effective ESG strategy for private equity.

More information about the conference is not yet available.

**Fees**

No charge for institutional investors (defined as pension funds, foundations, endowments and sovereign wealth funds)

**Contact**

Please go to the website to contact conference organizer.

**Email**

N/A

**Link:** <https://www.peievents.com/en/event/responsible-investment-forum-new-york>



## *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 and 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 of U.S. asset owners, primarily pension funds, state and local entities charged with investing public assets and endowments and foundations, with combined assets of \$4 trillion. Its associate members include non-U.S. asset owners with more than \$4 trillion in assets and a range of asset managers with more than \$35 trillion in assets under management. 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](https://www.cii.org/ev_calendar_day.asp?date=3/9/2020&eventid=47)

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

**Conference:** Talent 2020

**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.

See the website for more information about the conference.

**Fees**

\$2,895 - non-members  
\$2,395 - members  
\$400 discount for registering by  
January 11, 2020

**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

Joseph Engelberg, 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)** January 20, 2020, Ottawa ON

**& Location(s)** April 8, 2020, Vancouver BC

April 14, 2020, Winnipeg MB

**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>

**Conference:** Fixed Income & Credit

**Start Date:** March 24, 2020

**Organizer:** Pensions & Investments

**End Date:** March 24, 2020

**Location:** Dallas, Texas

**Alternative Date(s)** March 26, 2020, New York NY

**& Location(s)**

**Topic Area:** Investments

**Attendance:** By Invitation Only

Investors need assets that provide returns in a low-yield environment. Recent years have seen a major shift into private credit, strong interest in unconstrained fixed income, and growing interest in emerging markets and quant strategies. This conference will provide a survey of fixed income assets and strategies, and how they fit into a risk profile.

See the website for more information about the conference.

**Fees**

Not yet available.

Please contact conference organizer.

**Contact**

Elayne Glick

Audience Development Director

Phone: (212) 210-0247

**Email**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/fixed-income/2020>

**Conference:** Fixed Income & Credit

**Organizer:** Pensions & Investments

**Location:** New York, New York

**Start Date:** March 26, 2020

**End Date:** March 26, 2020

**Alternative Date(s) & Location(s)** March 24, 2020, Dallas TX

**Topic Area:** Investments

**Attendance:** By Invitation Only

Investors need assets that provide returns in a low-yield environment. Recent years have seen a major shift into private credit, strong interest in unconstrained fixed income, and growing interest in emerging markets and quant strategies. This conference will provide a survey of fixed income assets and strategies, and how they fit into a risk profile.

See the website for more information about the conference.

**Fees**

Not yet available.  
Please contact conference organizer.

**Contact**

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

**Email**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/fixed-income/2020>

**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 and 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:** Audit Committee Effectiveness

**Start Date:** April 08, 2020

**Organizer:** Institute of Corporate Directors

**End Date:** April 08, 2020

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

**Alternative Date(s) & Location(s)** January 20, 2020, Ottawa ON  
March 23, 2020, Halifax NS  
April 14, 2020, Winnipeg MB

**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: March 11, 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>

**Conference:** Pension Bridge Annual

**Start Date:** April 14, 2020

**Organizer:** Pension Bridge

**End Date:** April 15, 2020

**Location:** San Francisco, California

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

**Topic Area:** Investments

**Attendance:** Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together attendees from North America's largest investors and global asset managers, its conferences offer an intimate environment to strengthen relationships, discuss market trends and challenges, and refresh your knowledge of the investment industry.

Facing a challenging investment environment, this conference will focus on capital preservation, identifying the key reward drivers for generating consistent returns. As the industry awaits an expected cycle contraction, speakers will discuss challenges, strategies and opportunities this poses, highlighting structural transformations and investment ideas that will be beneficial to long-term fiscal sustainability.

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:** <https://www.pensionbridge.com/theannual>

**Course:** Audit Committee Effectiveness

**Start Date:** April 14, 2020

**Organizer:** Institute of Corporate Directors

**End Date:** April 14, 2020

**Location:** Winnipeg, Manitoba, Canada

**Alternative Date(s)** January 20, 2020, Ottawa ON

**& Location(s)** March 23, 2020, Halifax NS

April 8, 2020, Vancouver BC

**Topic Area:** Board Governance & Leadership

**Attendance:** Open To All

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

See website for more information about the program.

**Fees**

\$1,395 CAD - for non-members

\$1,050 CAD - for ICD members

\$950 - for ICD directors

Application deadline: March 17, 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>

**Conference:** Annual Conference

**Start Date:** April 19, 2020

**Organizer:** Public Retirement Information Systems Management (PRISM)

**End Date:** April 22, 2020

**Location:** Atlanta, Georgia

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

**& Location(s)**

**Topic Area:** Operations

**Attendance:** Members Only

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

More information about the conference is not yet available.

**Fees**

Not yet available.

**Contact**

Please go to the website to contact conference organizer.

**Email**

N/A

**Link:** <https://prism-assoc.org/CustomPage/Index/31>

**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)** Oct. 19-23, 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. 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>

**Conference:** Portfolio Concepts and Management

**Start Date:** April 20, 2020

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

**End Date:** April 23, 2020

**Location:** Philadelphia, Pennsylvania

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

**Topic Area:** Investments

**Attendance:** Open To All

This program provides the core principles of portfolio theory and investment performance measurement, offering practical tools and experiences to help you make reliable investment management decisions. Topics include:

- Introduction and Overview of Financial Assets
- Fundamentals of Portfolio Theory
- Performance Evaluation
- Fundamentals of Valuation
- Managing Pensions in a Risky Global Environment
- Macroeconomic Issues and Financial Markets
- Asset Allocation and Impacts of Risk on Return

**Fees**

\$6,235 - non-members

\$5,795 - members

\$300 discount for registration by March 9, 2020

**Contact**

Toll Free: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/education/certificateprograms/wharton/Pages/portfolio-concepts-and-management-2004.aspx>

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

**Conference:** Chief Investment Officer Summit

**Start Date:** April 21, 2020

**Organizer:** Plan Sponsor

**End Date:** April 22, 2020

**Location:** New York, New York

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

**Topic Area:** General

**Attendance:** Open To All

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

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

More information about the conference is not yet available.

**Fees**

Not yet available.

**Contact**

Rebecca Moore  
Phone: 203-595-3276

**Email**

Rebecca.Moore@issgovernance.com

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

**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)** N/A

**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**

**Organizer:** Institutional Investor

**Location:** Los Angeles, California

**Start Date:** April 29, 2020

**End Date:** May 01, 2020

**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**

**Organizer:** The Conference Board

**Location:** New York, New York

**Start Date:** April 30, 2020

**End Date:** May 01, 2020

**Alternative Date(s)  
& Location(s)** June 4-5, 2020, Chicago IL

**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  
\$400 discount for registering by February 22, 2020

**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:** Washington Legislative Update

**Start Date:** May 04, 2020

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** May 05, 2020

**Location:** Washington, District of Columbia

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

**Topic Area:** Legislation

**Attendance:** Open To All

How will the 2020 presidential election impact our health care system and retirement structure?

Your pipeline to what is happening on the Hill, the Washington Legislative Update will address potential changes to tax policy, entitlement programs, health care and retirement. Hear from Washington insiders and experts in their fields at a time when the legislative and regulatory agenda is evolving. Review the 2019 brochure to learn what to expect at this program.

**Fees**

\$1,580 for Members  
\$1,800 for Non-Members  
Register by March 23, 2020 to  
Save \$300

**Contact**

Toll Free: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/education/schedule/Pages/washington-legislative-update-2012.aspx>

**Conference:** Managing Longevity Risk: New Public/Private Perspectives

**Start Date:** May 07, 2020

**Organizer:** Pension Research Council, The Wharton School

**End Date:** May 08, 2020

**Location:** Philadelphia, Pennsylvania

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

**Topic Area:** Pension Plan Policy

**Attendance:** Members Only

This symposium discusses what rising longevity means for our future, how people perceive longevity risk, and the economics and psychology of working longer. Case studies focus on partnerships between public and private sector firms in the aging economy, including new products for plan sponsors, benefits specialists, actuaries, academics, regulators, and plan participants.

The symposium is for members only and by invitation. Please visit the website and log in for more information.

**Fees**

Not available. Please contact  
conference organizer.

**Contact**

Phone: 215.898.7620  
Fax: 215.573.3418

**Email**

prc@wharton.upenn.edu

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

**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 seminar is 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 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 a trustee accreditation program specifically designed and tailored for individuals involved in 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. The modules are offered two at a time (1&2 and 3&4), twice a year, and may be taken in any order. It is recommended that candidates first complete the Trustee Educational Seminar (TEDS).

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. Held annually in conjunction with the Annual Conference & Exhibition, 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 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:** Healthcare

**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.

See the website for more information about the conference.

**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. It will feature presentations from noted investors, geopolitical experts, best-selling authors, leading researchers, and successful practitioners, covering alternative investing, wealth management, global trends, career development, technology and investing, sustainable investing, psychology and decision making, and more.

See the website for more information about the conference.

**Fees**

\$1,595 - non-members  
\$1,395 - CFA members  
\$200 & \$100 discounts for registration by Dec. 31, 2019 and March 31, 2020.

**Contact**

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

**Email**

program@cfainstitute.org

**Link:** [https://annual.cfainstitute.org/?s\\_cid=dsp\\_AnnualConference2020\\_CFAEnterpriseSite\\_AC73Home\\_LearnMore\\_300](https://annual.cfainstitute.org/?s_cid=dsp_AnnualConference2020_CFAEnterpriseSite_AC73Home_LearnMore_300)

**Conference:** Annual Conference

**Start Date:** May 17, 2020

**Organizer:** Government Finance Officers Association (GFOA)

**End Date:** May 20, 2020

**Location:** New Orleans, Louisiana

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

**Topic Area:** General

**Attendance:** Open To All

The program will be finalized in January 2020 and will include approximately 75 concurrent sessions. Each session will contain a panel of speakers carefully selected to provide best practice guidance, discussion of current events, case studies, debate, and interactive exercises to cover a complete suite of topics pertinent for finance officers of all types and representing all forms of state and local governments. Information on each session including speakers, bios, handouts, will be available as it becomes available.

**Fees**

Not yet available.

**Contact**

Tel:(312) 977-9700  
Fax:(312) 977-4806

**Email**

**Link:** <https://gfoa.org/annual-conference/annual-conference-overview>

**Conference: Discussion Forum**

**Start Date:** May 31, 2020

**Organizer:** International Centre for Pension Management (ICPM)

**End Date:** June 03, 2020

**Location:** Toronto, Ontario, Canada

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

**Topic Area:** General

**Attendance:** By Invitation Only

ICPM organizes two Discussion Forums each year that bring together ICPM's Research Partners with leading authorities from academia and policy-making circles to network and build knowledge about critical issues facing the pension system. Held in different parts of the world, Discussion Forums provide a collegial setting for senior executives in the ICPM network and other distinguished pension and investment practitioners to exchange ideas on key pension management topics. In addition, these events feature presentations by academic researchers on findings from ICPM-sponsored research. Research papers, presentation materials and case studies presented at past Discussion Forums are available as a resource for ICPM's Research Partners on global best practices. Summaries of key insights are also provided.

More information about the Forum is not yet available.

**Fees**

Not available. Please contact the conference organizer.

**Contact**

Karen Clarke  
Phone: 416.925.4153  
Fax: 416.925.7377

**Email**

kclarke@icpmnetwork.com

**Link:** <https://icpmnetwork.com/company/roster/companyRosterDetails.html?companyId=18845&companyRosterId=47>

**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)** Nov. 16-20, 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. 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:** Leadership Development Conference

**Start Date:** June 04, 2020

**Organizer:** The Conference Board

**End Date:** June 05, 2020

**Location:** Chicago, Illinois

**Alternative Date(s) & Location(s)** Apr. 30 - May 1, 2020, New York NY

**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  
\$400 discount for registering by March 28, 2020

**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=3083>



**Conference:** Plan Sponsor National Conference

**Start Date:** June 08, 2020

**Organizer:** Plan Sponsor

**End Date:** June 10, 2020

**Location:** Orlando, Florida

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

**Topic Area:** General

**Attendance:** Open To All

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

More information about the conference is not yet available.

**Fees**

Not yet available.

**Contact**

Rebecca Moore  
Phone: 203-595-3276

**Email**

Rebecca.Moore@issgovernance.com

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

**Course:** Board Oversight of Strategy

**Start Date:** June 08, 2020

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

**End Date:** June 08, 2020

**Location:** Toronto, Ontario, Canada

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

**Topic Area:** Board Governance & Leadership

**Attendance:** Open To All

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

See the website for more information about the program.

**Fees**

\$1,395 CAD - for non-members  
\$1,050 CAD - for ICD members  
\$950 - for ICD directors  
Application deadline: May 11, 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>

**Conference:** 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>

**Conference:** Public Employee Benefits Institute

**Start Date:** June 29, 2020

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** July 01, 2020

**Location:** San Francisco, California

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

**Topic Area:** General

**Attendance:** Open To All

The public sector has faced unique challenges in recent years with budget cuts and media attention on benefit plans. The Public Employee Benefits Institute is dedicated to addressing the benefits topics most critical to public plans. Gather in an intimate environment to hear best practices, discuss issues and share ideas with peers who work with public sector benefit plans.

More information about the conference is not yet available.

**Fees**

\$1,550 - Member, register before  
May 18, 2020 (non-member  
\$1,880)  
\$1,850 - Member, register after  
May 18, 2020 (non-member  
\$2,180)

**Contact**

Toll Free: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/education/TrusteesAdmin/Pages/public-sector-benefits-institute-2009pe.aspx>

**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

The Pacific Pension & Investment Institute (PPI) is an educational nonprofit organization. It convenes global pension and investment professionals for in-depth dialogue and knowledge sharing on issues facing long-term institutional investors in Asia and the Pacific Rim. Limited to roughly 120 senior executives from the institutional investor community (and invited guests), the roundtables 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 seminar is not yet available.

**Fees**

Not available.  
Please contact the conference organizer.

**Contact**

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

**Email**

info@ppi.institute

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

**Conference:** Trustee Workshop

**Start Date:** July 19, 2020

**Organizer:** National Council on Teacher Retirement (NCTR)

**End Date:** July 22, 2020

**Location:** Berkeley, California

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

**Topic Area:** General

**Attendance:** Members Only

The National Council on Teacher Retirement (NCTR) is constituted as an independent association dedicated to safeguarding the integrity of public retirement systems in the United States and its territories to which teachers belong and to promoting the rights and benefits of all present and future members of the systems.

This workshop is presented in affiliation with the UC Berkeley Center for Executive Education at the Haas School of Business. It is developed with input from board trustees on the NCTR Trustee Education Committee and is designed by and for public pension board trustees. Workshop agenda items offer a wide range of educational content for both new and experienced trustees.

More information about the workshop is not yet available.

**Fees**

Not yet available.  
Last year's fees: \$2,550

**Contact**

Robyn Wheeler  
Phone: (916) 509-7260

**Email**

rwheeler@nctr.org

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

**Course:** Alternative Investment Strategies

**Start Date:** July 20, 2020

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

**End Date:** July 22, 2020

**Location:** San Francisco, California

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

**Topic Area:** Investments

**Attendance:** Open To All

This program provides practical education to help you understand the complexities of alternative investments. Focused on the topics of hedge funds and real estate investing for benefit funds, this advanced-level program will provide you with the tools to make effective investment decisions. Topics include:

- Introduction and Overview of Hedge Funds and Other Alternative Investments
- Institutional Interest in Hedge Funds and Hedge Fund Styles and Flows
- Hedge Fund Investing
- Lessons From Hedge Fund Failures and Topics in Hedge Fund Allocation
- Other Alternative Investment Trends and the Future
- Equity Investments in Real Estate
- Debt Investments in Real Estate

See the website for more information about the program.

**Fees**

\$4,755 - non-members  
\$4,455 - members  
\$300 discount for registration by  
June 8, 2020

**Contact**

Phone: (262) 786-6710  
Toll-free: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/education/certificateprograms/wharton/Pages/alternative-investment-strategies-20h5.aspx>

**Conference:** CFA Institute Seminar for Global Investors

**Start Date:** July 20, 2020

**Organizer:** CFA Institute - Hosted by CFA Society Chicago

**End Date:** July 23, 2020

**Location:** Chicago, Illinois

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

**Topic Area:** Investments

**Attendance:** Open To All

This seminar (previously known as the Financial Analysts Seminar), held each year for the last 65 years, gathers a faculty of leading investors and researchers to provide their insights, perspectives, and practical takeaways to a global audience of asset managers and asset owners. With the objective of improving investment decisions, participants at the seminar study an array of investment topics. The material places a special emphasis on improving the practice of investment management and successfully achieving client objectives.

See the website for more information about the seminar.

**Fees**

Not yet available.  
Last year's conference fees:  
\$3,495  
\$2,995 - CFA members

**Contact**

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

**Email**

programs@cfainstitute.org

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

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

**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:** General

**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>

**Course:** Public Pension Investment Management Program

**Start Date:** July 26, 2020

**Organizer:** SACRS & Haas School of Business, UC Berkeley

**End Date:** July 29, 2020

**Location:** Berkeley, California

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

**Topic Area:** Investments

**Attendance:** Members Only

This course, Modern Investment Theory & Practice for Retirement Systems, is a four-day course offering SACRS' members in-depth knowledge on today's successful investment models and strategies. They will learn how to practically integrate these methods immediately into their own plan administration, advancing their skills and elevating the collective expertise of SACRS' membership. Completion of the course earns them a certificate of achievement from UC Berkeley.

This program is widely popular and limited to 30-40 people. System members have registration priority.

See the website for more information about the program.

**Fees**

Not yet available.  
Last year's fees: \$2,500

**Contact**

Phone: 916-701-5158

**Email**

sacrs@sacrs.org

**Link:** <https://sacrs.org/Events/SACRS-UC-Berkeley-Program>

**Conference:** Private Equity Exclusive

**Start Date:** July 27, 2020

**Organizer:** Pension Bridge

**End Date:** July 28, 2020

**Location:** Chicago, Illinois

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

**Topic Area:** Investments

**Attendance:** Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together attendees from North America's largest investors and global asset managers, its conferences offer an intimate environment to strengthen relationships, discuss market trends and challenges, and refresh your knowledge of the investment industry.

Amid sustained volatility in the public markets and peak cycle uncertainty, this conference will focus on the most important issues, outlooks, challenges, opportunities and trends that will shape the Private Equity Industry for today and the future.

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:** <https://www.pensionbridge.com/exclusive>

**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>

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

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

**Start Date:** August 25, 2020

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

**End Date:** August 28, 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 and 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: Retirement Income**

**Organizer:** Pensions & Investments

**Location:** San Francisco, California

**Start Date:** September 15, 2020

**End Date:** September 15, 2020

**Alternative Date(s) & Location(s)** September 17, 2020, New York NY

**Topic Area:** Investments

**Attendance:** By Invitation Only

This conference will provide a platform to discuss and debate how to provide plan participants with the tools and strategies designed to achieve the most stable and consistent income stream possible given the retiree's overall wealth and anticipated Social Security income. Specifically, how can retirement savings be optimally invested and allocated pre and post-retirement and what factors should be considered when annuitizing?

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**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/retirement-income/2020>

**Conference: Retirement Income**

**Organizer:** Pensions & Investments

**Location:** New York, New York

**Start Date:** September 17, 2020

**End Date:** September 17, 2020

**Alternative Date(s) & Location(s)** September 15, 2020, San Francisco CA

**Topic Area:** Investments

**Attendance:** By Invitation Only

This conference will provide a platform to discuss and debate how to provide plan participants with the tools and strategies designed to achieve the most stable and consistent income stream possible given the retiree's overall wealth and anticipated Social Security income. Specifically, how can retirement savings be optimally invested and allocated pre and post-retirement and what factors should be considered when annuitizing?

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**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/retirement-income/2020>



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

**Conference:** Fall Conference

**Start Date:** September 21, 2020

**Organizer:** Council of Institutional Investors

**End Date:** September 23, 2020

**Location:** San Francisco, California

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

**Topic Area:** Corporate Governance

**Attendance:** Members Only

The Council of Institutional Investors (CII), is a nonprofit, nonpartisan association of U.S. asset owners, primarily pension funds, state and local entities charged with investing public assets and endowments and foundations, with combined assets of \$4 trillion. Its associate members include non-U.S. asset owners with more than \$4 trillion in assets and a range of asset managers with more than \$35 trillion in assets under management. 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.

Registration will open in May 2020.

**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=9/21/2020&eventid=48](https://www.cii.org/ev_calendar_day.asp?date=9/21/2020&eventid=48)

**Conference:** Certificate of Achievement in Public Plan Policy - Part I

**Start Date:** September 22, 2020

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** September 23, 2020

**Location:** Santa Monica, California

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

**Topic Area:** General

**Attendance:** Open To All

More information about the conference is not yet available.

**Fees**

Not yet available.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/Education/CertificatePrograms/CAPPP/Pages/default.aspx>

**Conference:** Certificate of Achievement in Public Plan Policy - Part II

**Start Date:** September 24, 2020

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** September 25, 2020

**Location:** Santa Monica, California

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

**Topic Area:** General

**Attendance:** Open To All

More information about the conference is not yet available.

**Fees**

Not yet available.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/Education/CertificatePrograms/CAPPP/Pages/default.aspx>

**Conference:** Global Markets

**Start Date:** September 29, 2020

**Organizer:** Pensions & Investments

**End Date:** September 29, 2020

**Location:** Chicago, Illinois

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

**Topic Area:** Investments

**Attendance:** By Invitation Only

This conference will provide an up-to-the-minute update on trends in the global economy, where the opportunities and challenges are, and what are the best methods for accessing specific markets. Whether investors are new to investing in global growth markets or are looking to update their strategies, this conference will provide the background and information needed to create a global growth markets strategy that fits each fund's objectives.

In addition to hearing from economic and global markets experts, attendees will have the opportunity to hear case studies from pension funds, endowments, foundations and sovereign wealth funds. The day also includes ample time for networking with the speakers, experts and peer institutional investors.

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**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/global-markets/2020/>

**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:** Global Markets

**Start Date:** October 01, 2020

**Organizer:** Pensions & Investments

**End Date:** October 01, 2020

**Location:** New York, New York

**Alternative Date(s)  
& Location(s)** September 29, 2020, Chicago IL

**Topic Area:** Investments

**Attendance:** By Invitation Only

This conference will provide an up-to-the-minute update on trends in the global economy, where the opportunities and challenges are, and what are the best methods for accessing specific markets. Whether investors are new to investing in global growth markets or are looking to update their strategies, this conference will provide the background and information needed to create a global growth markets strategy that fits each fund's objectives.

In addition to hearing from economic and global markets experts, attendees will have the opportunity to hear case studies from pension funds, endowments, foundations and sovereign wealth funds. The day also includes ample time for networking with the speakers, experts and peer institutional investors.

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**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/global-markets/2020/>

**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](mailto:rwheeler@nctr.org)

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

**Conference:** Managing Pension Risk & Liabilities

**Start Date:** October 13, 2020

**Organizer:** Pensions & Investments

**End Date:** October 13, 2020

**Location:** Dallas, Texas

**Alternative Date(s)  
& Location(s)** October 15, 2020, Atlanta GA  
October 20, 2020, New York NY

**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. Whether considering a pension risk transfer or managing an open plan, attendees will walk-away with the newest and best ideas for pension risk management.

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**

[eglick@pionline.com](mailto:eglick@pionline.com)

**Link:** <https://conferences.pionline.com/conference/pension-risk/2020/>

**Conference: Fixed Income Management**

**Start Date:** October 15, 2020

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

**End Date:** October 16, 2020

**Location:** Boston, Massachusetts

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

**Topic Area:** Investments

**Attendance:** Open To All

Covering practical topics that address fixed-income sectors, security selection, and portfolio construction, this 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.

See the website for more information about the conference.

**Fees**

Not yet available.  
Last year's conference fees:  
\$1,595 - non-members  
\$1,295 - CFA members

**Contact**

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

**Email**

ceprogram@cfa institute.org

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

**Conference: Managing Pension Risk & Liabilities**

**Start Date:** October 15, 2020

**Organizer:** Pensions & Investments

**End Date:** October 15, 2020

**Location:** Atlanta, Georgia

**Alternative Date(s)  
& Location(s)** October 13, 2020, Dallas TX  
October 20, 2020, New York NY

**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. Whether considering a pension risk transfer or managing an open plan, attendees will walk-away with the newest and best ideas for pension risk management.

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**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/pension-risk/2020/>

**Conference:** Annual Conference

**Start Date:** October 17, 2020

**Organizer:** National Pension Education Association (NPEA)

**End Date:** October 21, 2020

**Location:** Seattle, Washington

**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/annual-conference>

**Course:** Private Equity: Investing and Creating Value

**Start Date:** October 19, 2020

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

**End Date:** October 23, 2020

**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. 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>

**Conference: Managing Pension Risk & Liabilities**

**Start Date:** October 20, 2020

**Organizer:** Pensions & Investments

**End Date:** October 20, 2020

**Location:** New York, New York

**Alternative Date(s)** October 13, 2020, Dallas TX  
**& Location(s)** October 15, 2020, Atlanta GA

**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. Whether considering a pension risk transfer or managing an open plan, attendees will walk-away with the newest and best ideas for pension risk management.

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**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/pension-risk/2020/>

**Conference: Annual Conference**

**Start Date:** October 25, 2020

**Organizer:** Public Pension Financial Forum (P2F2)

**End Date:** October 28, 2020

**Location:** Philadelphia, Pennsylvania

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

**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>

**Conference: Annual Conference**

**Start Date:** October 25, 2020

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

**End Date:** October 28, 2020

**Location:** Chicago, Illinois

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

**Topic Area:** General

**Attendance:** Open To All

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

More information about the conference is not yet available.

**Fees**

Not yet available.  
Last year's fees:  
\$1,735 - non-members  
\$1,430 - members

**Contact**

Phone: 703.516.9300  
Fax: 703.516.9308

**Email**

customercare@asppa-net.org

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

**Conference: Alternatives Conference**

**Start Date:** October 26, 2020

**Organizer:** Pension Bridge

**End Date:** October 27, 2020

**Location:** Chicago, Illinois

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

**Topic Area:** Investments

**Attendance:** Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together attendees from North America's largest investors and global asset managers, its conferences offer an intimate environment to strengthen relationships, discuss market trends and challenges, and refresh your knowledge of the investment industry.

With the longest bull market in US history at an end, this conference will discuss how to avoid mistakes and generate alpha, in this extremely challenging investment era. Sharing their knowledge, speakers will provide insights into how portfolio construction, risk diversification and asset allocation will be key in avoiding the pitfalls as this extended cycle turns.

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:** <https://www.pensionbridge.com/alternatives>



**Conference:** The Evolution of OCIO

**Start Date:** November 04, 2020

**Organizer:** Pensions & Investments

**End Date:** November 05, 2020

**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 of growth in the investment management industry. Over the past three years, assets invested through OCIOs have grown at an approximate annualized rate of 15% to a total of \$1.7 trillion. Markets continue to become increasingly complex and economies unstable adding to the challenges facing institutional investors of all sizes. Several OCIO clients now include funds with more than \$10 Billion AUM.

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. The conference will address the 'why' and the 'how' of the model and will 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**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/outsourcing-cios/2020/>

**Conference:** Discussion Forum

**Start Date:** November 08, 2020

**Organizer:** International Centre for Pension Management (ICPM)

**End Date:** November 11, 2020

**Location:** Washington, District of Columbia

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

**Topic Area:** General

**Attendance:** By Invitation Only

ICPM organizes two Discussion Forums each year that bring together ICPM's Research Partners with leading authorities from academia and policy-making circles to network and build knowledge about critical issues facing the pension system. Held in different parts of the world, Discussion Forums provide a collegial setting for senior executives in the ICPM network and other distinguished pension and investment practitioners to exchange ideas on key pension management topics. In addition, these events feature presentations by academic researchers on findings from ICPM-sponsored research. Research papers, presentation materials and case studies presented at past Discussion Forums are available as a resource for ICPM's Research Partners on global best practices. Summaries of key insights are also provided.

More information about the forum is not yet available.

**Fees**

Not available. Please contact the conference organizer.

**Contact**

Karen Clarke  
Phone: 416.925.4153  
Fax: 416.925.7377

**Email**

kclarke@icpmnetwork.com

**Link:** <https://icpmnetwork.com/company/roster/companyRosterDetails.html?companyId=19113&companyRosterId=68>

**Conference: Fall Conference**

**Start Date:** November 10, 2020

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

**End Date:** November 13, 2020

**Location:** Indian Wells, 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**

Not yet available.  
Last year's 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: Trustees Masters Program**

**Start Date:** November 14, 2020

**Organizer:** International Foundation of Employee Benefit Plans (IFEBCP)

**End Date:** November 15, 2020

**Location:** Honolulu, Hawaii

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

**Topic Area:** General

**Attendance:** Open To All

More information about the conference is not yet available.

**Fees**

\$1,850 for Members  
\$2,180 for Non-Members  
Register by May 10, 2020 to  
Save \$300

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/education/new-trustees-institute-level-ii/Pages/new-trustees-institute-level-ii-concepts-in-practice-20n9.aspx>

**Conference:** 66th Annual Employee Benefits Conference

**Start Date:** November 15, 2020

**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)

**End Date:** November 18, 2020

**Location:** Honolulu, Hawaii

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

**Topic Area:** General

**Attendance:** Members Only

The 66th Annual Employee Benefits Conference is the largest gathering of multiemployer and public employee benefit plan representatives. This must-attend event offers you the opportunity to network with your peers, be surrounded by industry experts and learn the latest in the industry so you can make the most informed decisions on behalf of your funds.

With topics ranging from legal and legislative to health and welfare to retirement security, the Annual Employee Benefits Conference is the educational event to attend for most current information and perspectives from leading industry experts on all areas of employee benefits. With so many options to choose from, the Annual Conference is like attending several conferences all rolled into one!

**Fees**

\$1,625 for Members  
\$1,925 for Non-Members

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/education/usannual/Pages/annual-employee-benefits-conference-2001.aspx>

**Course:** Investment Strategies and Portfolio Management

**Start Date:** November 16, 2020

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

**End Date:** November 20, 2020

**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. 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>

**Conference: Asset Allocation**

**Organizer:** Pensions & Investments

**Location:** Chicago, Illinois

**Start Date:** November 17, 2020

**End Date:** November 17, 2020

**Alternative Date(s) & Location(s)** November 19, 2020, New York NY

**Topic Area:** Investments

**Attendance:** Open To All

In order to be more resilient to ever-changing financial climates characterized by consistently high volatility and risk premia, a successful asset allocation investing strategy must identify and evaluate priorities and effectively manage risk. Multi-asset strategies continue to play a part in overall strategy providing the potential for upside plus the protection against downside across a wide variety of market conditions. This conference will help navigate this challenging and turbulent landscape by examining the following:

- How to set your strategy in an unpredictable world
- Dynamic portfolio risk management
- Tactical rebalancing
- Diversification and asset allocation strategies
- Alternative risk premia solutions: beyond stocks and bonds
- Managing alpha vs managing beta

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**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/asset-allocation/2020>

**Conference: Asset Allocation**

**Organizer:** Pensions & Investments

**Location:** New York, New York

**Start Date:** November 19, 2020

**End Date:** November 19, 2020

**Alternative Date(s) & Location(s)** November 17, 2020, Chicago IL

**Topic Area:** Investments

**Attendance:** Open To All

In order to be more resilient to ever-changing financial climates characterized by consistently high volatility and risk premia, a successful asset allocation investing strategy must identify and evaluate priorities and effectively manage risk. Multi-asset strategies continue to play a part in overall strategy providing the potential for upside plus the protection against downside across a wide variety of market conditions. This conference will help navigate this challenging and turbulent landscape by examining the following:

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- Diversification and asset allocation strategies
- Alternative risk premia solutions: beyond stocks and bonds
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See the conference website for more information.

**Fees**

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Please contact the conference organizer.

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**Email**

eglick@pionline.com

**Link:** <https://conferences.pionline.com/conference/asset-allocation/2020>

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

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