



The Cortex Report

Customized for the

San José Retirement Boards

May 2020

ALERT – Impact of COVID-19

Please note that due to COVID-19, many events have been cancelled and more cancellations are likely. The Cortex Report reflects any cancellations as of the issue date. We recommend that readers visit the website or contact the organizer of any programs they are interested in to ensure the event has not been canceled/rescheduled.

We wish all our readers health and safety in these difficult times,

The staff at Cortex

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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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Start Date	Primary Organizer	Event	Location	Page	
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Apr 19, 2021	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia	26	<i>New</i>

Event Listings

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: ESG Investing

Start Date: May 12, 2020

Organizer: Pensions & Investments

End Date: May 12, 2020

Location: San Francisco, California

**Alternative Date(s)
& Location(s)** May 14, 2020, Chicago IL
May 19, 2020, Boston MA
May 21, 2020, New York NY

Topic Area: ESG and ethical investing

Attendance: Open To All

The program will feature asset owners, asset managers, and ESG experts who will discuss:

- ESG as a risk management strategy
- Reporting that provides transparency for companies, asset managers and investors
- Practical guidelines for incorporating ESG considerations into the investment process
- Assessing the risk-adjusted returns for ESG investing
- Performance measuring and monitoring from an ESG perspective

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Elayne Glick
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Email

eglick@pionline.com

Link: <https://conferences.pionline.com/conference/esg-conference/2020>

The Cortex Report prepared for the San José Retirement Boards

Conference: ESG Investing

Organizer: Pensions & Investments

Location: Chicago, Illinois

Start Date: May 14, 2020

End Date: May 14, 2020

Alternative Date(s) & Location(s) May 12, 2020, San Francisco CA
May 19, 2020, Boston MA
May 21, 2020, New York NY

Topic Area: ESG and ethical investing

Attendance: Open To All

The program will feature asset owners, asset managers, and ESG experts who will discuss:

- ESG as a risk management strategy
- Reporting that provides transparency for companies, asset managers and investors
- Practical guidelines for incorporating ESG considerations into the investment process
- Assessing the risk-adjusted returns for ESG investing
- Performance measuring and monitoring from an ESG perspective

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

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Email

pi-registration@pionline.com

Link: <https://conferences.pionline.com/conference/esg-conference/2020>

Conference: ESG Investing

Organizer: Pensions & Investments

Location: Boston, Massachusetts

Start Date: May 19, 2020

End Date: May 19, 2020

Alternative Date(s) & Location(s) May 12, 2020, San Francisco CA
May 14, 2020, Chicago IL
May 21, 2020, New York NY

Topic Area: ESG and ethical investing

Attendance: Open To All

The program will feature asset owners, asset managers, and ESG experts who will discuss:

- ESG as a risk management strategy
- Reporting that provides transparency for companies, asset managers and investors
- Practical guidelines for incorporating ESG considerations into the investment process
- Assessing the risk-adjusted returns for ESG investing
- Performance measuring and monitoring from an ESG perspective

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

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Email

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Link: <https://conferences.pionline.com/conference/esg-conference/2020>

Conference: ESG Investing

Organizer: Pensions & Investments

Location: New York, New York

Start Date: May 21, 2020

End Date: May 21, 2020

Alternative Date(s) & Location(s) May 12, 2020, San Francisco CA
May 14, 2020, Chicago IL
May 19, 2020, Boston MA

Topic Area: ESG and ethical investing

Attendance: Open To All

The program will feature asset owners, asset managers, and ESG experts who will discuss:

- ESG as a risk management strategy
- Reporting that provides transparency for companies, asset managers and investors
- Practical guidelines for incorporating ESG considerations into the investment process
- Assessing the risk-adjusted returns for ESG investing
- Performance measuring and monitoring from an ESG perspective

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

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Email

eglick@pionline.com

Link: <https://conferences.pionline.com/conference/esg-conference/2020>

Seminar: Investment Strategies and Portfolio Management

Organizer: The Wharton School, University of Pennsylvania

Location: Philadelphia, Pennsylvania

Start Date: June 01, 2020

End Date: June 05, 2020

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>

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 by May 18, 2020 (non-member \$1,880). \$1,850 - Member, register by 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: Public Funds Roundtable

Start Date: July 13, 2020

Organizer: Institutional Investor

End Date: July 16, 2020

Location: Los Angeles, California

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

Topic Area: Investments

Attendance: By Invitation Only

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

More information about the conference is not yet available.

Fees

Not available. Registration limited to investment executives from pension funds. Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

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

The Cortex Report prepared for the San José Retirement Boards

Seminar: Alternative Investment Strategies

Start Date: July 20, 2020

Organizer: International Foundation of Employee Benefit Plans (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>

Seminar: Public Pension Investment Management Program

Start Date: July 26, 2020

Organizer: State Association of County Retirement Systems (SACRS)

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

Conference: Public Pension Funding Forum

Start Date: August 23, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: August 25, 2020

Location: Chicago, Illinois

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

Topic Area: Pension Plan Policy

Attendance: Open To All

The issue of pension funding gap, real or not, is often used to change pension plans as we know them. The most common solutions revolve around increasing employee and employer contributions, reducing benefits, and converting lifetime guarantee of defined benefit pensions into do it yourself pension schemes.

This forum will examine the obstacles that stand in the way of closing public pension funding gap and explore new solutions to overcome such obstacles, including better risk management in economic cycles, use of new and improved debt instruments, and closing tax loopholes.

More information about the conference is not yet available.

Fees

\$685

Contact

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

Email

registration@ncpers.org

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

Conference: Pension Bridge Annual

Start Date: August 25, 2020

Organizer: Pension Bridge

End Date: August 26, 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>

Seminar: Principles of Pension Governance for Trustees **Start Date:** August 25, 2020
Organizer: California Association of Public Retirement Systems (CALAPRS) **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=>

Conference: Sustainable Returns: ESG Investing **Start Date:** September 15, 2020
Organizer: Institutional Investor **End Date:** September 16, 2020
Location: New York, New York **Alternative Date(s) & Location(s)** N/A

Topic Area: ESG and ethical investing

Attendance: By Invitation Only

The rise of ESG investing in allocators' portfolios continues to outpace that of most other active strategies. And institutional investors are not the only ones taking notice. Underlying plan participants and stakeholders are demanding more transparency and accountability around investments. That trend is only predicted to increase as the coming decades will see millennials projected to control \$30 trillion of investable assets. This one-day summit will allow investors to explore environmental, social and governance investing from various viewpoints.

More information about the conference is not yet available.

Fees

No fee. Limited to "qualified" institutional investors.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Sustainable>Returns-ESG-Investing>

Conference: East Coast Private Markets Summit

Start Date: September 17, 2020

Organizer: Institutional Investor

End Date: September 17, 2020

Location: Boston, Massachusetts

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

Topic Area: Investments

Attendance: By Invitation Only

The largest asset owners across North America continue to show growing confidence in private markets as they continue to increase allocations to an array of strategies across private equity, venture capital, private debt, infrastructure and real estate. Yet, in a world where the outlook for the next ten years looks drastically different to the last ten, the need to innovate and look in new sectors in order to find good returns without taking excessive risk and stay competitive has never been more paramount.

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

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

Conference: 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

Conference: Redefining Fixed Income Forum

Start Date: September 22, 2020

Organizer: Institutional Investor

End Date: September 23, 2020

Location: Chicago, Illinois

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

Topic Area: Investments

Attendance: By Invitation Only

More information about the conference is not yet available.

Fees

Not available. Registration limited to "qualified individuals". Please contact the conference organizer to register.

Contact

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Fax: (212) 224-3802

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Redefining-Fixed-Income-Forum>

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

Start Date: September 22, 2020

Organizer: International Foundation of Employee Benefit Plans (IFEBCP)

End Date: September 23, 2020

Location: Santa Monica, California

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

Topic Area: General

Attendance: Open To All

An essential program for new public sector trustees working with employee pensions, this program addresses the fundamental areas involved in managing employee pension plans. Sessions dissect the basics of what you need to know for your role and the distinguished faculty bring real-life scenarios and years of experience to enrich the content and your takeaways.

To earn your CAPPP® in Employee Pensions, Part I and Part II must be completed along with a take-home exam.

Fees

Not yet available.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/capp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-capp-pension-part-i-20a1.aspx>

Conference: Plan Sponsor National Conference

Start Date: September 24, 2020

Organizer: Plan Sponsor

End Date: September 26, 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/>

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

Start Date: September 24, 2020

Organizer: International Foundation of Employee Benefit Plans (IFEBCP)

End Date: September 25, 2020

Location: Santa Monica, California

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

Topic Area: General

Attendance: Open To All

Expanding upon the fundamental knowledge gained in Part I, the Certificate in Employee Pensions - Part II addresses the elements of plan design, investments, improvement strategies and emerging issues so you can be fully equipped to make the necessary decisions for your plans.

The structure of the CAPPP® program is flexible. Part II of the Certificate in Employee Pensions can be taken prior to Part I to accommodate your schedule. To earn your certificate both Part I and Part II must be completed along with a take-home exam.

Fees

Not yet available.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/capp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-capp-pension-part-ii-20a2.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/>

The Cortex Report prepared for the San José Retirement Boards

Conference: Global Markets

Organizer: Pensions & Investments

Location: New York, New York

Start Date: October 01, 2020

End Date: October 01, 2020

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: Fall Conference

Organizer: Journal of Investment Management

Location: Atlanta, Georgia

Start Date: October 05, 2020

End Date: October 06, 2020

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

Topic Area: Investments

Attendance: Open To All

Agenda not yet available.

Fees

Not available. Please contact conference organizer.

Contact

Phone: (925) 299-7800
Fax: (925) 299-7815

Email

customerservice@joim.com

Link: <https://www.joim.com/conference-series/>

Seminar: Private Equity: Investing and Creating Value
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania

Start Date: October 19, 2020
End Date: October 23, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Investments

Attendance: Open To All

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

Start Date: October 23, 2020

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: October 23, 2020

Location: San Jose, California

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

Topic Area: General

Attendance: Members Only

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

More information about the conference is available exclusively to CALAPRS member systems and sponsors. Please visit the website 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=1317767&group=>

Conference: Accredited Fiduciary (NAF) Program

Start Date: October 24, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 25, 2020

Location: Nashville, Tennessee

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

Topic Area: General

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

Early-bird registration fees: \$815

Contact

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

Email

registration@ncpers.org

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

Conference: Public Safety Conference

Start Date: October 25, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 28, 2020

Location: Nashville, Tennessee

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

Topic Area: General

Attendance: Members Only

This conference is dedicated to providing quality education that is specifically tailored for the unique needs and demands of public safety pensions. Since 1985, it has educated hundreds of public safety pension trustees, administrators and staff; union officials; and local elected officials by featuring presentations from recognized leaders in both the worlds of finance and politics, providing news on the latest developments, and offering attendees the opportunity to network with fellow trustees.

More information about the conference is not yet available.

Fees

\$715

Contact

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

Email

registration@ncpers.org

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

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)
& Location(s)** N/A

Topic Area: Operations

Attendance: Members Only

The Public Pension Financial Forum is organized for education, pension advocacy and networking purposes for public pension plans. To support the ongoing education of its membership, it prepares quarterly newsletters, holds member facilitated conference calls and hosts an annual conference at a North American location.

More information about the conference is not yet available.

Fees

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

Contact

Phone: 614-227-0059

Email

information@p2f2.org

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

Conference: Alternatives Conference

Start Date: October 26, 2020

Organizer: Pension Bridge

End Date: October 27, 2020

Location: Los Angeles, 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 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: 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: Leadership Development Conference

Start Date: November 10, 2020

Organizer: The Conference Board

End Date: November 11, 2020

Location: Chicago, Illinois

Alternative Date(s) & Location(s) Nov. 19-20, 2020, New York, NY

Topic Area: Leadership

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/leadership-development-chicago>

Conference: Equity Research and Valuation

Start Date: November 12, 2020

Organizer: CFA Institute

End Date: November 13, 2020

Location: New York, New York

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

Topic Area: Investments

Attendance: Open To All

This conference aims to keep investment managers abreast of the latest advances and developments in equity research techniques, valuation, and portfolio management. Join world-class equity investors for insights into valuation to help you avoid the market’s noise and stay focused on client objectives. Learn to avoid behavioral pitfalls in investing, and gain a better understanding of the differences between pricing assets and valuation.

See the website for more information about the conference.

Fees

Not yet available.

Contact

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

Email

ceprogram@cfaoinstitute.org

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

Conference: Trustees Masters Program

Start Date: November 14, 2020

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: November 15, 2020

Location: Honolulu, Hawaii

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

Topic Area: General

Attendance: Open To All

Build on your knowledge of being a multi-employer trustee by attending the New Trustees Institute—Level II: Concepts in Practice. This institute is for trustees with three or more years of experience, expanding on the concepts provided at the New Trustees Institute—Level I: Core Concepts.

Discover best practices, identify possible solutions and recognize critical issues by attending this interactive program. Register early! Class size is limited to foster deeper comprehension and peer-to-peer discussion.

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: 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>

Seminar: 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

Start Date: November 17, 2020

Organizer: Pensions & Investments

End Date: November 17, 2020

Location: Chicago, Illinois

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: Fixed Income & Credit

Organizer: Pensions & Investments

Location: Dallas, Texas

Start Date: November 17, 2020

End Date: November 17, 2020

Alternative Date(s) & Location(s) Nov. 19, 2020, New York NY

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: 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:

- 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: Fixed Income & Credit

Organizer: Pensions & Investments

Location: New York, New York

Start Date: November 19, 2020

End Date: November 19, 2020

Alternative Date(s) & Location(s) Nov. 17, 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>

Conference: Leadership Development Conference

Organizer: The Conference Board

Location: New York, New York

Start Date: November 19, 2020

End Date: November 20, 2020

Alternative Date(s) & Location(s) Nov. 10-11, 2020, Chicago, IL

Topic Area: Leadership

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/leadership-development-chicago>

Conference: Investing for Good USA

Start Date: December 01, 2020

Organizer: Financial Times (FT)

End Date: December 01, 2020

Location: New York, New York

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

Topic Area: Investments

Attendance: By Invitation Only

As climate protests achieve global prominence, words such as “catastrophe”, “urgency” and “emergency” are being used more frequently in discussions about the threats climate change presents to the planet and its people. Meanwhile, with increasing amounts data available to demonstrate the link between climate change and the financial performance of climate-related investments, asset owners are pushing both the companies in their portfolios and the asset managers who manage those portfolios to develop strategies that reflect pressing climate realities.

See the website for more information about the conference.

Fees

Not available. Please contact conference organizer.

Contact

Phone: +44 (0)20 7775 6653

Email

ftlive@ft.com

Link: <https://live.ft.com/Events/2020/FT-Investing-for-Good-USA>

Conference: Defined Benefit Investment Forum

Start Date: December 03, 2020

Organizer: Canadian Investment Review

End Date: December 03, 2020

Location: Toronto, Ontario, Canada

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

Topic Area: Pension Plan Policy

Attendance: By Invitation Only

This is an exclusive forum, bringing together DB plan decision-makers, consultants and leading industry experts to share their views, practices and theories to address the challenges and issues they are faced with in the current economy.

More information about the Forum is not yet available.

Fees

No charge for qualified DB decision-makers and investment consultants.
Please contact conference organizer.

Contact

Alison Webb, Publisher
Phone: 416-847-8578

Email

alison.webb@tc.tc

Link: <http://www.investmentreview.com/conference/defined-benefit-investment-forum-2020>

Seminar: Venture Capital

Start Date: December 06, 2020

Organizer: The Wharton School, University of Pennsylvania

End Date: December 10, 2020

Location: San Francisco, California

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

Topic Area: Investments

Attendance: Open To All

This program will discuss how VC funds are organized, how investments are selected, and how due diligence is conducted. It will examine case studies that detail a transaction from beginning to end. Participants will see how a deal is structured, learn more about the differing incentives of a VC fund and entrepreneurs, and gain a deeper understanding of venture investing. Session topics may include:

- Limited Partner/General Partner Negotiation and Contracting
- The VC Business Model: Sourcing, Screening, and Selection
- Venture Capital Valuation Method
- Term Sheets: The Venture Capitalist's and Entrepreneur's perspectives
- Deal Sourcing
- Managing Innovative Processes
- Later-Round Financing
- Preferred Stock Valuation
- Exit Strategies

See the website for more information about the program.

Fees

\$11,350

Fees include meals but not accommodations.

Contact

Phone: 215.898.1776

Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference: Annual Conference

Start Date: December 14, 2020

Organizer: International Corporate Governance Network (ICGN)

End Date: December 16, 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: Legislative Conference

Start Date: January 24, 2021

Organizer: National Conference on Public Employee Retirement Systems

End Date: January 26, 2021

Location: Washington, District of Columbia

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

Topic Area: Legislation

Attendance: Members Only

This is a conference for public fund trustees and plan administrators, highlighting the issues on Capitol Hill and in federal regulatory agencies that affect pension funds today. Past conferences have brought senior administration officials, Members of Congress and Washington insiders to help educate fund members on the critical issues affecting public pensions and equip them with the tools needed to deal with these issues effectively and meet-face-to-face with their elected leaders on the Hill.

See the website for more information about the conference.

Fees

Not yet available

Contact

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

Email

registration@ncpers.org

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

Conference: PREA Spring Conference

Start Date: March 25, 2021

Organizer: Pension Real Estate Association (PREA)

End Date: March 26, 2021

Location: Seattle, Washington

**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

Not yet available.

Contact

Amy Laffargue
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Phone: 860-785-3846
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Email

amy@prea.org

Link: <https://spring2020.prea.org/>

Seminar: Advanced Principles of Pension Management for Trustees	Start Date: March 31, 2021
Organizer: California Association of Public Retirement Systems (CALAPRS)	End Date: April 02, 2021
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=>

Seminar: Private Equity: Investing and Creating Value	Start Date: April 19, 2021
Organizer: The Wharton School, University of Pennsylvania	End Date: April 23, 2021
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

\$11,350
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>

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

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