The Cortex Report

Customized for the

San José Retirement Boards

July 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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Event Listings

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Seminar: **Global Asset Allocation**
Organizer: BCA Research
Location: On-line
Start Date: July 02, 2020
End Date: July 02, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

BCA has been an independent provider of global investment research for over 65 years. Markets are, to use Paul Samuelson's phrase, "micro efficient but macro inefficient." CIOs, asset allocators, and investment professionals often struggle to find a practical way to construct optimal multi-asset portfolios. This course will help you:
• Learn methods and strategies to harvest alpha from these macro inefficiencies.
• Identify portfolio objectives as a starting point for successful asset allocation strategies.
• Match the macro environment with the appropriate asset allocation strategies - often the most challenging part of the investment process.
• Become more effective at interpreting how BCA's Global Asset Allocation team sees the world; an important input given the increasingly complex macro environment.
• Gain a better understanding of how to develop and execute asset allocation strategies, and how investors should be positioned given prevailing market conditions.

See the website for more information about the program.

Fees

$1,888

Contact

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

Email

academy@bcaresearch.com

Link: https://interactive.bcaresearch.com/academy/global-asset-allocation-719PC-9561L1.html?

Seminar: **Alternative Investment Strategies**
Organizer: International Foundation of Employee Benefit Plans (IFEBP)
Location: San Francisco, California
Start Date: July 20, 2020
End Date: July 22, 2020
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
Early bird discount of $300 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

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Seminar: **Public Pension Investment Management Program**
Organizer: State Association of County Retirement Systems (SACRS)
Location: Berkeley, California

Start Date: July 26, 2020
End Date: July 29, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

Presented by the world-renowned faculty of UC Berkeley's Haas School of Business, 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. You'll learn how to practically integrate these methods immediately into your own plan administration, advancing your skills and elevating the collective expertise of SACRS' membership. Completion of the course earns you a certificate of achievement from UC Berkeley. Agenda for the 2020 program is under development.

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

$500

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

Seminar: **Geopolitics and Investing**
Organizer: BCA Research
Location: On-line

Start Date: August 03, 2020
End Date: August 03, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

BCA has been an independent provider of global investment research for over 65 years. Geopolitical analysis is an essential component of a sound investment strategy. Shifts in the global balance of power away from the U.S., growing demands for populist policies in Anglo-Saxon economies, and the 'crisis of expectations' among EM middle classes reinforce the view that geopolitical risk to investment portfolios is not a fad.

The course combines seventy years of macroeconomic research with geopolitical risk analysis. The analytical framework regards geopolitics as either a risk or an opportunity, recognizing the need to preserve capital and/or seek profits as events are mispriced in the market. The course focuses on the geopolitical and macroeconomic realities that constrain policymakers' options, zeroing in on the investment implications and consequences of their decisions.

See the website for more information about the program.

Fees

$1,888

Contact

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

Email

academy@bcaresearch.com

Link: https://interactive.bcaresearch.com/academy/geopolitics-and-investing-719PC-956213.html?

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Conference: **Annual Conference**
Organizer: National Association of State Retirement Administrators (NASRA)
Location: On-line
Start Date: August 08, 2020
End Date: August 12, 2020
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 $4.5 trillion held in trust for 15 million working and 11 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.

Fees

Not yet available

Contact

Mary Hiatte
Phone: 202.624.1418

Email

mary@nasra.org

Link: http://www.nasra.org/meetings

Seminar: **Virtual Program: Principles for Trustees**
Organizer: California Association of Public Retirement Systems (CALAPRS)
Location: On-line
Start Date: August 18, 2020
End Date: August 26, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: General
Attendance: Members Only

Online program featuring abbreviated sessions from CALAPRS popular annual program for new public pension fund trustees. Due to the COVID-19 pandemic and restrictions on gatherings in California, the in-person Principles of Pension Governance for Trustees program held at Pepperdine University has been postponed until 2021. To continue CALAPRS' mission of providing education for trustees during these unprecedented times, CALAPRS has arranged with its faculty of subject-matter experts to present abbreviated versions of several key educational topics from this program in an online format.

All course materials are based on actual California public pension fund law, policies, practices and problems.

Fees

Full virtual program: $500
Fiduciary session only: $125
Investments session only: $250
Actuarial: $250

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=

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Conference: **Portfolio Concepts and Management**
Start Date: September 14, 2020
Organizer: International Foundation of Employee Benefit Plans (IFEBP)
End Date: September 17, 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-member
$5,795 - member
Early bird discount of $440 if registered by Aug. 3, 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

Conference: **RI Toronto**
Start Date: September 15, 2020
Organizer: Responsible Investor
End Date: September 15, 2020
Location: Toronto, Ontario, Canada
Alternative Date(s) & Location(s) N/A

Topic Area: ESG and ethical investing
Attendance: By Invitation Only

Responsible Investor will be launching the RI Toronto 2020 conference this September, an invite-only ESG conference.

Agenda not yet available on website. Please sign up using the website to receive the latest updates.

Fees

Not available.
Please contact conference organizer.

Contact

Hamish Stewart
Events Leader, Americas
Phone: +44 20 7680 7162

Email

hamish@responsible-investor.com

Link: https://mailchi.mp/5feaff033aaf/th61doxqr7

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Conference: **Fall Conference**

Organizer: Council of Institutional Investors

Location: San Francisco, California

Start Date: September 21, 2020

End Date: September 23, 2020

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=9/21/2020&eventid=48

Conference: **Redefining Fixed Income Forum**

Organizer: Institutional Investor

Location: Chicago, Illinois

Start Date: September 22, 2020

End Date: September 23, 2020

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

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

Email

kstorfer@institutionalinvestor.com

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

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Conference: **Certificate of Achievement in Public Plan Policy - Part I**
Organizer: International Foundation of Employee Benefit Plans (IFEBP)
Location: Santa Monica, California
Start Date: September 22, 2020
End Date: September 23, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Pension Plan Benefit Policy
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.

Topics include: governance, fiduciary responsibilities, legal, legislative, and regulatory developments, and actuarial principles.

Fees

$1,695 - non-member
$1,475 - member
Early bird discount of $220 if registered by Aug. 13, 2020.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference: **Plan Sponsor National Conference**
Organizer: Plan Sponsor
Location: Orlando, Florida
Start Date: September 24, 2020
End Date: September 26, 2020
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, ideas in retirement plan design, investment options and solutions, and legislative and regulatory updates.

More information about the conference is not yet available.

Fees

Free for plan sponsors.
$195 early bird rate for other participants.

Contact

Rebecca Fahey
Events Coordinator
Tel: +1-203-595-3292

Email

rebecca.fahey@issmediasolutions.com

Link: https://www.plansponsor.com/events/2020psnc/

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Conference: **Certificate of Achievement in Public Plan Policy - Part II**
Organizer: International Foundation of Employee Benefit Plans (IFEBP)
Location: Santa Monica, California
Start Date: September 24, 2020
End Date: September 25, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Pension Plan Benefit Policy
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.

Topics include: plan design, investments, business improvement strategies, and emerging issues.

Fees

$1,695 - non-member
$1,475 - member
Early bird discount of $220 if registered by Aug. 13, 2020.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference: **Global Markets**
Organizer: Pensions & Investments
Location: Chicago, Illinois
Start Date: September 29, 2020
End Date: September 29, 2020
Alternative Date(s) & Location(s) Oct. 1, 2020, New York NY

Topic Area: Investments
Attendance: Open To All

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/

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Conference: **Annual Institutional Investor Real Estate Conference**
Organizer: Pension Real Estate Association (PREA)
Location: Boston, Massachusetts
Start Date: September 30, 2020
End Date: October 02, 2020
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: **Delivering Alpha**
Organizer: Institutional Investor
Location: New York, New York
Start Date: September 30, 2020
End Date: September 30, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: By Invitation Only

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

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer to register.

Contact

Email

events@cnbc.com

Link: https://www.cnbcevents.com/delivering-alpha/

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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: Open To All

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/

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Conference: **Roundtable for Consultants & Institutional Investors**
Organizer: Institutional Investor
Location: Chicago, Illinois
Start Date: October 06, 2020
End Date: October 09, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: By Invitation Only

The Roundtable for Consultants & Institutional Investors will look ahead to the worlds that could be and examine the implicit – or explicit – bets that institutional investors have made on those variations.

See the website for more information about the conference.

Fees

Not available. Attendance is limited to investment executives from qualified investment consultants, pension funds, endowments and foundations. Please contact the conference

Contact

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

Email

kstorfer@institutionalinvestor.com

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

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Conference: **Private Equity Exclusive**
Organizer: Pension Bridge
Location: Chicago, Illinois
Start Date: October 12, 2020
End Date: October 13, 2020
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.

Taking place in Chicago annually, The Private Equity Exclusive attracts over 400 attendees from across North America, for a day and a half of knowledge sharing and networking.

Amid the COVID-19 pandemic and sustained volatility in the public markets, attendees will learn from the experts about the most important issues, outlooks, challenges, opportunities and trends expedited by the crisis which 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

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Phone: 561-455-2729
Fax: 561-258-8258

Email

bsemel@pensionbridge.com

Link: https://www.pensionbridge.com/exclusive

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Seminar: **Certificate Series - Investment Basics**
Organizer: International Foundation of Employee Benefit Plans (IFEBP)
Location: Las Vegas, Nevada

Start Date: October 16, 2020
End Date: October 17, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

Take a single course in a specific area or take three courses to earn a Certificate of Achievement in the discipline of your choice. Find solutions for today's challenges and prepare for tomorrow's opportunities through an enriching learning experience that combines valuable materials, outstanding instruction and networking opportunities.

Topics include:
- Investment terms
- Risk and return
- Stocks, bonds and mutual funds
- Investment benchmarks
- Portfolio management and asset allocation
- Contemporary investment issues
- Economic considerations
- Tax considerations
- Sources of information

Fees

$1,795 - non-member
$1,575 - members

Early bird discount of $220 if registered by Sept. 2, 2020.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: https://www.ifebp.org/education/certificateprograms/certificateseries/schedule/Pages/certificate-series-investment-basics-2073.aspx

Conference: **Public Funds Roundtable**
Organizer: Institutional Investor
Location: Los Angeles, California

Start Date: October 19, 2020
End Date: October 21, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: By Invitation Only

Everything changed in March. Markets cratered. Investors were homebound. Thousands of people lost their lives to the disease. As we emerge from the human and financial destruction, there has never been a
more important time to speak with your peers and partners, face-to-face, about picking up the pieces. To focus on the strategies and tactics that will allow you to deliver much-needed capital to your participants. And to focus on resetting the theories, practices, and fallacies of institutional investing. In short, it's time to ignore the noise – and focus on the essential.

Please visit the website for the meeting agenda.

Fees

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

Contact

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Email

kstorfer@institutionalinvestor.com

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

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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) Apr. 19-23, 2021, Philadelphia PA

Topic Area: Investments
Attendance: Open To All

In Private Equity: Investing and Creating Value, you will:
• Learn the various stages of investment, from deal origination through harvesting returns
• Study tools that private equity firms use to structure and finance a deal, create value, and determine exit timing
• Understand the key drivers in the private equity market, and key differences between funds' strategies
• Analyze a deal from the different points of view of a private equity firm and a bank
• Work in teams to review actual deal scenarios, both middle market and megafund, and debate recommendations with faculty and peers for new perspective
• Gain experience in navigating the complex arena of global private equity and emerging markets

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

Conference: **Trustees' Roundtable**
Organizer: California Association of Public Retirement Systems (CALAPRS)
Location: San Jose, California

Start Date: October 23, 2020
End Date: October 23, 2020
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=

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Conference: **Annual Conference**
Organizer: Public Pension Financial Forum (P2F2)
Location: Philadelphia, Pennsylvania
Start Date: October 25, 2020
End Date: October 28, 2020
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 available.
Please contact conference organizer.

Contact

Phone: 614-227-0059

Email

information@p2f2.org

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

Conference: **Discussion Forum**
Organizer: International Centre for Pension Management (ICPM)
Location: Washington, District of Columbia
Start Date: November 08, 2020
End Date: November 11, 2020
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/viewEvent.html?no_header=true&productId=7139

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Conference: **Fall Conference**
Organizer: State Association of County Retirement Systems (SACRS)
Location: Indian Wells, California
Start Date: November 10, 2020
End Date: November 13, 2020
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**
Organizer: International Foundation of Employee Benefit Plans (IFEBP)
Location: Honolulu, Hawaii
Start Date: November 14, 2020
End Date: November 15, 2020
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

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Conference: **Annual Employee Benefits Conference**
Organizer: International Foundation of Employee Benefit Plans (IFEBP)
Location: Honolulu, Hawaii
Start Date: November 15, 2020
End Date: November 18, 2020
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

$1,925 - members
Early bird discount of $300 if registered by Oct. 5, 2020.

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**
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania
Start Date: November 16, 2020
End Date: November 20, 2020
Alternative Date(s) & Location(s) June 14-18, 2021, Philadelphia PA

Topic Area: Investments
Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:
• Increase your understanding of modern portfolio theory and behavioral finance
• Improve your ability to measure investment performance
• Learn new asset allocation tools
• Recognize when to choose active managers versus passive investments
• Understand the opportunities and risks of bonds, hedge funds, private equity, real estate, international markets, and derivatives
• Better navigate and manage risk
• Gain insights into the global economy and potential future market disruptions

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

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Conference: **Asset Allocation**

Organizer: Pensions & Investments

Location: Chicago, Illinois

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: 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: Open To All

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 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

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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) Nov. 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: Open To All

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 available.
Please contact conference organizer.

Contact

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Email

eglick@pionline.com

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

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Conference: **Sustainable Returns: ESG Investing**
Organizer: Institutional Investor
Location: New York, New York
Start Date: November 19, 2020
End Date: November 20, 2020
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

Katarina Storfer
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: **Leadership Development Conference**
Organizer: The Conference Board
Location: On-line
Start Date: November 19, 2020
End Date: November 20, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Leadership
Attendance: Open To All

Today's intense combination of economic, social, and political issues is challenging leadership like never before. Organizations are experiencing significant change and transformation, and pressures have led to an incredible need for human-centered, high impact leadership applications and methodologies. This year's event will examine the latest best practices, strategies, and success stories for transforming the world of leadership. This year's focus will be on innovative and superior practices and mindsets necessary to advance your leadership development into the future. Participants will have the opportunity to engage in a highly interactive and human centered conference experience.

More information about the conference is not yet available.

Fees

$495 - non-members
Free - members

Contact

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

Email

customer.service@conferenceboard.org

Link: https://www.conference-board.org/leadership-development

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Conference: **Investing for Good USA**
Organizer: Financial Times (FT)
Location: New York, New York
Start Date: December 01, 2020
End Date: December 01, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: Investments
Attendance: Open To All

While in the short term, the Covid-19 pandemic has focused attention on restoring public health and preserving the economy, the crisis has also raised awareness of the need to boost the green economy and build resilience ahead of another impending crisis: climate change. Meanwhile, with increasing evidence that investments that take climate stewardship into account can achieve superior financial performance, 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. This conference will discuss the role the investment community can play in unleashing the financial flows that are urgently needed if we are to recover from the Covid-19 crisis while also avoiding the worst effects of climate change.

See the website for more information about the conference.

Fees

$900 if book before Sept. 26

Contact

Phone: +44 (0)20 7775 6653

Email

ftlive@ft.com

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

Conference: **RI New York**
Organizer: Responsible Investor
Location: New York, New York
Start Date: December 02, 2020
End Date: December 03, 2020
Alternative Date(s) & Location(s) N/A

Topic Area: ESG and ethical investing
Attendance: Open To All

This conference will provide a forum for investors to debate shareholder rights and proxy access, the role of central banks and securities regulators in climate risk, the importance of transforming energy systems, the impact of technologies like AI and machine learning on investor portfolios, requirements for data privacy, and ways to include human rights and other governance factors into investment portfolios. It provides a unique opportunity to learn, share and debate on responsible investment issues with 600+ investment professionals from across the globe. You will engage with North America’s largest investors on key themes affecting local markets and the rest of the world. Thought-leaders from across the institutional investment sector as well as academic researchers and scientists will come together to debate key issues.

Agenda not yet available on website. Please sign up using the website to receive the latest updates.

Fees

No charge for asset owner and investment consultants.

Contact

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Events Leader, Americas
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Email

hamish@responsible-investor.com

Link: https://mailchi.mp/43d67758111f/i3rgaznmmu

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Conference: **Defined Benefit Investment Forum**
Organizer: Canadian Investment Review
Location: Toronto, Ontario, Canada
Start Date: December 03, 2020
End Date: December 03, 2020
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 the conference organizer to register. Attendance is subject to approval by the

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**
Organizer: The Wharton School, University of Pennsylvania
Location: San Francisco, California
Start Date: December 06, 2020
End Date: December 10, 2020
Alternative Date(s) & Location(s) Jul. 27 - Aug. 6, 2020, on-line

Topic Area: Investments
Attendance: Open To All

In Venture Capital, you will:
• Learn how VC funds are structured, how they operate, and why organizational structure matters to limited partners, general partners, and even founders
• Understand how to raise capital from limited partners, including the design of partnership agreements that enable effective relationships
• Develop a systematic way to screen, analyze, and value high-growth investment opportunities in nascent industries
• Discover effective ways to manage innovative processes
• Acquire a framework to negotiate, price, and structure the best investor terms
• Learn how to best navigate the shareholder's agreement to avoid costly mistakes
• Identify how and when to exit the investment

See the website for more information about the program.

Fees

$11,350
Fees include meals but not accomodations.

Contact

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Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

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Conference: **Annual Conference**

Organizer: International Corporate Governance Network (ICGN)

Location: Toronto, Ontario, Canada

Start Date: December 14, 2020

End Date: December 16, 2020

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

Topic Area: Corporate Governance

Attendance: Open To All

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

Seminar: **ICGN Governance, Stewardship & Sustainability Course**

Organizer: International Corporate Governance Network (ICGN)

Location: Toronto, Ontario, Canada

Start Date: December 17, 2020

End Date: December 18, 2020

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

Topic Area: ESG and ethical investing

Attendance: Open To All

The aim of this seminar is to help investors, companies and others understand how to protect and generate long-term value through careful consideration of Stewardship and ESG factors as part of their investment decision making process.

This seminar is made up of six modules and a case study, together with recommended reading.

For more information, please visit the website.

Fees

£800 - member
£1,100 - non-member

Contact

Elle Thomas
Head of Events
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Email

florence.doel@icgn.org

Link: https://www.icgn.org/events/icgn-governance-stewardship-sustainability-course-toronto

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Conference: **Alternatives Conference**

Organizer: Pension Bridge

Location: Los Angeles, California

Start Date: January 11, 2021

End Date: January 12, 2021

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.

The conference will address what the post-COVID world will look like and how you can invest for that environment in the alts space. With the longest bull market in US history coming to an end, attendees will explore how to best diversify risk and generate higher returns in various alternative asset classes, which alternative strategies make the most sense now, and how a sound portfolio construction process can be critical to avoiding the pitfalls of behavioral biases which have become apparent.

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

bsemel@pensionbridge.com

Link: https://www.pensionbridge.com/alternatives

Conference: **Legislative Conference**

Organizer: National Conference on Public Employee Retirement Systems

Location: Washington, District of Columbia

Start Date: January 24, 2021

End Date: January 26, 2021

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

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Conference: **Annual Health Benefits Conference & Expo**

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

Location: Clearwater, Florida

Start Date: January 25, 2021

End Date: January 27, 2021

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

Topic Area: Healthcare Management

Attendance: Open To All

HBCE is one of the nation's premier sources for employee health benefits and wellness education. In times of change, having real-life examples and proven solutions is paramount to help guide your decision making. Addressing current topics revolving around cost-containment strategies, compliance initiatives and population health management, this program is a vital part of health benefits and wellness planning. Join your peers to get the latest updates and information that can make a positive impact on your organization.

For more information, visit the website.

Fees

Govt/Public - $575
Early bird discounts of $130 or $100 if registered by Aug. 31, 2020 or Dec. 18, 2020, respectively.

Contact

Phone: (888) 334-3327

Email

edreg@ifebp.org

Link: https://www.ifebp.org/education/schedule/Pages/health-benefits-conference-and-expo-hbce.aspx

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Conference: **General Assembly**

Organizer: California Association of Public Retirement Systems (CALAPRS)

Location: Monterey, California

Start Date: March 06, 2021

End Date: March 09, 2021

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/page/generalassembly

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Conference: **PREA Spring Conference**
Organizer: Pension Real Estate Association (PREA)
Location: Seattle, Washington

Start Date: March 25, 2021
End Date: March 26, 2021
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
Director, Meetings and Events
Phone: 860-785-3846
Fax: 860-692-6351

Email

amy@prea.org

Link: https://www.prea.org/events/upcoming-events/

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

Start Date: April 19, 2021
End Date: April 23, 2021
Alternative Date(s) & Location(s) Oct. 19-23, 2020, Philadelphia PA

Topic Area: Investments
Attendance: Open To All

In Private Equity: Investing and Creating Value, you will:
• Learn the various stages of investment, from deal origination through harvesting returns
• Study tools that private equity firms use to structure and finance a deal, create value, and determine exit timing
• Understand the key drivers in the private equity market, and key differences between funds' strategies
• Analyze a deal from the different points of view of a private equity firm and a bank
• Work in teams to review actual deal scenarios, both middle market and megafund, and debate recommendations with faculty and peers for new perspective
• Gain experience in navigating the complex arena of global private equity and emerging markets

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

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execed@wharton.upenn.edu

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

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Conference: **Health Care Management Conference**
Organizer: International Foundation of Employee Benefit Plans (IFEBP)
Location: Miami, Florida

Start Date: April 19, 2021
End Date: April 21, 2021
Alternative Date(s) & Location(s) N/A

Topic Area: Healthcare Management
Attendance: Open To All

Health care is ever changing, and it can be hard to keep up and deal with issues and questions that arise.With so many changes and advancements, managing your fund requires action. The Health Care Management Conference will prepare you to make the tough decisions that will keep your fund moving forward, and it will give you the confidence to implement them. Register for this highly rated conference, and keep your fund moving in the right direction.

See website for more details.

Fees

Not yet available. Last year's fees were:
$2,180 - non-member
$1,850 - member
Early bird discount of $300.

Contact

Toll Free: (888) 334-3327

Email

edreg@ifebp.org

Link: https://www.ifebp.org/education/schedule/Pages/health-care-management-conference-2031.aspx

Conference: **Washington Legislative Update**
Organizer: International Foundation of Employee Benefit Plans (IFEBP)
Location: Washington, District of Columbia

Start Date: May 17, 2021
End Date: May 18, 2021
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.

See website for more details.

Fees

Not yet available. Last year's fees were:
$1,800 - non-members
$1,580 - members
Early bird discount of $300.

Contact

Toll Free: (888) 334-3327

Email

edreg@ifebp.org

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

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Conference: **Annual Conference**
Organizer: CFA Institute
Location: Toronto, Ontario
Start Date: May 18, 2021
End Date: May 21, 2021
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.

Taking place in Toronto, the conference will feature three full days of keynotes and concurrent sessions with noted economists, best-selling authors, leading researchers, and successful practitioners.

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: +1 (434) 951-5262

Email

program@cfainstitute.org

Link: https://www.cfainstitute.org/en/events/conferences/annual-2021

Conference: **Trustee Education Seminar**
Organizer: National Conference on Public Employee Retirement Systems
Location: Denver, Colorado
Start Date: May 22, 2021
End Date: May 23, 2021
Alternative Date(s) & Location(s) N/A

Topic Area: Board Governance
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.

The second day of TEDS features the Asset Allocation Challenge, an interactive computer-based investment training exercise. Members are placed in groups and asked to select assets based on the given economic environment presented to them. This program is ideal for new trustees and can be repeated.

TEDS attendees can earn up to eight (9.5) hours of continuing education credits.

Fees

Not yet available.

Contact

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

Email

registration@ncpers.org

Link: http://www.ncpers.org/teds

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Conference: **Program for Advanced Trustee Studies (PATS)**
Organizer: National Conference on Public Employee Retirement Systems
Location: Denver, Colorado
Start Date: May 22, 2021
End Date: May 23, 2021
Alternative Date(s) & Location(s) N/A

Topic Area: Board Governance
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.

PATS attendees can earn up to eight (8) hours of continuing education credits.

Fees

Not yet available.

Contact

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Email

registration@ncpers.org

Link: https://www.ncpers.org/pats

Conference: **Annual Conference and Exhibition**
Organizer: National Conference on Public Employee Retirement Systems
Location: Denver, Colorado
Start Date: May 23, 2021
End Date: May 26, 2021
Alternative Date(s) & Location(s) N/A

Topic Area: Healthcare Management
Attendance: Members Only

More than 900 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.

For more information, please visit the website.

Fees

Not yet available.

Contact

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Phone: 202-624-1456
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Email

registration@ncpers.org

Link: http://www.ncpers.org/ace

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Seminar: **Investment Strategies and Portfolio Management**

Organizer: The Wharton School, University of Pennsylvania

Location: Philadelphia, Pennsylvania

Start Date: June 14, 2021

End Date: June 18, 2021

Alternative Date(s) & Location(s) Nov. 16-20, 2020, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:
• Increase your understanding of modern portfolio theory and behavioral finance
• Improve your ability to measure investment performance
• Learn new asset allocation tools
• Recognize when to choose active managers versus passive investments
• Understand the opportunities and risks of bonds, hedge funds, private equity, real estate, international markets, and derivatives
• Better navigate and manage risk
• Gain insights into the global economy and potential future market disruptions

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

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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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