



# ***The Cortex Report***

**Customized for the**

**San José Retirement Boards**

**March 2021**

**FCERS 3-18-21**

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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.

Please also note the terms and conditions for use of this report at the end of the report.

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## ***Event Listings***

**Conference : Global East Government Funds Roundtable**

**Start Date:** March 01, 2021

**Organizer:** Institutional Investor

**End Date:** March 06, 2021

**Location:** On-line

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

**Difficulty:** Advanced

**Topic Area:** Investments

**Attendance:** By Invitation Only

This roundtable is a private gathering for the heads of investment from sovereign wealth funds, government pension plans and central bank reserve management funds from across the Asia-Pacific region to discuss the latest approaches to current investment challenges as well as complex governance issues.

See the website for more information about the conference.

**Fees**

Not available. Please contact organizer for details.

Participation is strictly limited to qualified executives.

**Contact**

Alastair Hills

**Email**

alastair.hills@institutionalinvestor.com

**Link:** <https://www.iiconferences.com/Global-East-Government-Funds-Virtual-Roundtable>

**Conference : Accredited Fiduciary (NAF) Program**

**Start Date:** March 02, 2021

**Organizer:** National Conference on Public Employee Retirement Systems

**End Date:** March 12, 2021

**Location:** On-line

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

**Difficulty:** General

**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**

\$400.

**Contact**

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

**Email**

registration@ncpers.org

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

**Conference : Responsible Investment Forum**

**Start Date:** March 03, 2021

**Organizer:** Private Equity International

**End Date:** March 04, 2021

**Location:** On-line

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

**Difficulty:** Intermediate

**Topic Area:** ESG and ethical investing

**Attendance:** Members Only

The Responsible Investment Forum returns for its fifth year as a virtual event to bring together the most sophisticated institutional investors, fund managers, consultants and highly recognized associations to discuss why, when, and how your firm should be implementing an effective ESG strategy.

Topics include: delivering social and environmental impact in the healthcare sector, good sustainability reporting, responsible investing for real estate investors, ESG in private debt, sustainable infrastructure investing, emerging opportunities in impact investing, and emerging markets.

See the website for more information about the conference.

**Fees**

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

**Contact**

**Email**

customerservices@peimedia.com

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

**Conference : Spring Conference**

**Start Date:** March 08, 2021

**Organizer:** Council of Institutional Investors

**End Date:** March 10, 2021

**Location:** On-line

**Alternative Date(s) & Location(s)** Mar 7 - 9 2022, Washington, District of Columbia

**Difficulty:** General

**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.

See website for agenda.

**Fees**

Members with bundled memberships - \$0  
Members - \$195  
Non-members - \$295  
See the website for details.

**Contact**

Kylund Arnold  
Phone: 202.822.0800

**Email**

kylund@cii.org

**Link:** [https://www.cii.org/ev\\_calendar\\_day.asp?date=3/8/2021&eventid=107](https://www.cii.org/ev_calendar_day.asp?date=3/8/2021&eventid=107)

**Conference : General Assembly**

**Start Date:** March 08, 2021

**Organizer:** California Association of Public Retirement Systems (CALAPRS)

**End Date:** March 09, 2021

**Location:** On-line

**Alternative Date(s)** Mar 5 - 8 2022,

**& Location(s)** Mar 4 - 7 2023, Monterey, California

**Difficulty:** General

Mar 2 - 5 2024, Rancho Mirage, California

**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>

**Seminar : Mobilizing Your Nonprofit Board**

**Start Date:** March 08, 2021

**Organizer:** Harvard Kennedy School

**End Date:** May 07, 2021

**Location:** On-line

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

**& Location(s)**

**Difficulty:** General

**Topic Area:** Investments

**Attendance:** Open To All

This course will provide you with the practical skills and conceptual frameworks that will help you lead more engaged boards. This course explores methods for motivating board members, fostering a boardroom culture that promotes rich dialogue, engaging your board in the big questions facing your organization without inviting them to micromanage, and cultivating a board that is both consequential to the organization and rewarding for its members.

The program explores four key topics:

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

See the website for more information about the program.

**Fees**

\$2,600

Application deadline:

February 8, 2021

**Contact**

Phone: +1-617-496-9000

**Email**

exed@hks.harvard.edu

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

**Conference : 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

**Difficulty:** Intermediate

**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 : Geopolitics and Investing**

**Start Date:** April 06, 2021

**Organizer:** BCA Research

**End Date:** April 06, 2021

**Location:** On-line

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

**Difficulty:** General

**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.

Attendees will develop an understanding of how geopolitical risk should be measured, how politics can impact investment returns, and what primary geopolitical and political trends will influence economic growth and market dynamics.

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?>

**Seminar : Venture Capital**

**Start Date:** April 19, 2021

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

**End Date:** April 30, 2021

**Location:** On-line

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

**Difficulty:** Practitioner

**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**

\$9,850

**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 : Legislative Conference**

**Start Date:** April 20, 2021

**Organizer:** National Conference on Public Employee Retirement Systems

**End Date:** April 20, 2021

**Location:** On-line

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

**Difficulty:** General

**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.

Registration and preliminary agenda for this event will be available in early 2021.

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 : Sustainable Investments in Retirement Plans**

**Start Date:** April 29, 2021

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

**End Date:** April 30, 2021

**Location:** On-line

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

**Difficulty:** Advanced

**Topic Area:** Pension Plan Policy

**Attendance:** Members Only

The 2021 Pension Research Council Symposium on Sustainable Investment in Retirement Plans: Challenges and Opportunities responds to rising global interest in environmental, social, governance (ESG), and impact investing to generate positive impact while generating financial return. Speakers explore the pros and cons of pension ESG investments; findings will interest researchers, management/advisory firms, financial advisors, asset owners, and policymakers. Plan sponsors and analysts also discuss case studies from the US and around the world.

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/>

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

**Start Date:** May 12, 2021

**Organizer:** International Corporate Governance Network (ICGN)

**End Date:** May 26, 2021

**Location:** On-line

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

**Difficulty:** General

**Topic Area:** ESG and ethical investing

**Attendance:** Open To All

The Governance, Stewardship and Sustainability course gives investment professionals, company managers, investor relations officers, corporate directors and other governance professionals what they need to know about the theoretical, empirical and especially practical aspects of integrating ESG into investor and company decision-making. The structure and content of this substantially-updated course reflect the accelerating pace of developments.

The course will be delivered in three approximately 2.5 sessions over the course of the month. The webinar format provides course participants the opportunity for live interaction with the instructors and other participants.

This course will run throughout May on the 12th, 19th, and 26th.

For more information, please visit the website.

**Fees**

£400 + 20% VAT - member

£600 + 20% VAT - non-member

**Contact**

Flo Doe

Senior Engagement Manager

Phone: +44 (0) 202 7612 7011

**Email**

florence.doel@icgn.org

**Link:** <https://www.icgn.org/events/icgn-online-governance-stewardship-sustainability-course-january-2021>

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

**Start Date:** May 17, 2021

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

**End Date:** May 27, 2021

**Location:** On-line

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

**Difficulty:** Practitioner

**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**

\$9,650  
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 : ESG Investing**

**Start Date:** May 17, 2021

**Organizer:** Pensions & Investments

**End Date:** May 20, 2021

**Location:** On-line

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

**Difficulty:** General

**Topic Area:** ESG and ethical investing

**Attendance:** Open To All

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

- Diversity and its impact on performance
- The regulatory environment and fiduciary obligations
- How climate can impact an overall portfolio
- Best vehicles and asset classes to make an impact
- Investment performance of ESG integrated products
- ESG as a risk management tool

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/esg-conference/2021>

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

**Start Date:** May 26, 2021

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

**End Date:** May 27, 2021

**Location:** Clearwater, Florida

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

**Difficulty:** General

**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**

Early Bird Rate: \$525  
Conference Rate: \$625

Check website for more options.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

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

**Conference : Plan Sponsor National Conference**

**Start Date:** June 07, 2021

**Organizer:** Plan Sponsor

**End Date:** June 10, 2021

**Location:** On-line

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

**Difficulty:** General

**Topic Area:** General

**Attendance:** By Invitation Only

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**

Not available. Please contact organizer.

**Contact**

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

**Email**

rebecca.fahey@issmediasolutions.com

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

**Conference : Private Markets**

**Organizer:** Pensions & Investments

**Location:** On-line

**Difficulty:** Advanced

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

**Start Date:** June 15, 2021

**End Date:** June 17, 2021

**Topic Area:** Investments

**Attendance:** Open To All

The program will feature asset owners and asset managers who will discuss:

- Benchmarking and measuring target returns
- Liquidity and premiums on the lack thereof
- Finding the right income-generating investments to provide a stream of capital
- Strategy conversations around private credit, infrastructure, real estate, real assets, etc. and how they all interact
- What performance statistics matter the most when assessing a partner and how to properly size your portfolio
- Dry powder and the balance of inflows with finding the right opportunities
- Secondary markets, direct and co-investing

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/private-markets/2021/agenda/Virtual%20Event>

**Conference : Investment Management Workshop**

**Organizer:** CFA Institute

**Location:** Boston, Massachusetts

**Difficulty:** Advanced

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

**Start Date:** June 20, 2021

**End Date:** June 24, 2021

**Topic Area:** Investments

**Attendance:** Open To All

The theme of this workshop is: Investing and Strategic Decision-Making. For over 50 years, this workshop has convened the world's top principals, portfolio managers, and executives to explore the latest industry strategies and best practices. It is focused on asset management, business strategy and development, and investment strategy and execution. You will gain fresh insights into how the investment management industry is evolving—and how those changes could affect your strategies and your organization.

Key benefits of attending include the following:

- Gain strategic insights into all segments of the industry
- Analyze complex challenges and potential solutions more effectively
- Broaden your range of potential investment and allocation strategies
- Expand your personal and professional network

See the website for more information about the workshop.

**Fees**

Not yet available.  
See the website for updates.

**Contact**

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

**Email**

university@cfainstitute.org

**Link:** <https://www.exed.hbs.edu/investment-management-workshop/>

**Conference : Public Funds Roundtable**

**Start Date:** June 24, 2021

**Organizer:** Institutional Investor

**End Date:** June 24, 2021

**Location:** On-line

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

**Difficulty:** General

**Topic Area:** Investments

**Attendance:** By Invitation Only

Join the Alternative Investor Institute & Institutional Investor institute's Virtual Roundtable for Public Pension Funds in June 2021 as we bring the institutional investing community together when they need it most – for the most essential intelligence for consultants, allocators, and managers alike.

Agenda and registration will be available soon.

**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/Virtual-Roundtable-Public-Pension-Funds-June-2021>

**Conference : Annual Conference**

**Start Date:** June 27, 2021

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

**End Date:** June 30, 2021

**Location:** Chicago, Illinois

**Alternative Date(s)  
& Location(s)** Jul 12 - 23 2021, On-line

**Difficulty:** General

**Topic Area:** General

**Attendance:** Open To All

GFOA's Annual Conference. Full details are not available yet.

Please note that the in-person conference details are subject to change. An alternative virtual conference will also be held July 12-23, 2021.

Please check website for updates.

**Fees**

Not available. Please contact conference organizer.

**Contact**

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

**Email**

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

**Seminar : Public Pension Investment Management Program**

**Start Date:** July 18, 2021

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

**End Date:** July 21, 2021

**Location:** On-line

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

**Difficulty:** General

**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**

Not available.

**Contact**

Phone: 916-701-5158

**Email**

sacrs@sacrs.org

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

**Conference : Pension Bridge Annual**

**Start Date:** August 04, 2021

**Organizer:** Pension Bridge

**End Date:** August 07, 2021

**Location:** On-line

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

**Difficulty:** Intermediate

**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.

More information about the conference is not yet available.

**Fees**

Please contact the conference organizer.

**Contact**

Phone: 561-455-2729

Fax: 561-258-8258

**Email**

bsemel@pensionbridge.com

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

**Conference : Annual Conference**

**Start Date:** August 07, 2021

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

**End Date:** August 11, 2021

**Location:** Pittsburgh, Pennsylvania

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

**Difficulty:** General

**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>

**Conference : Fall Conference**

**Start Date:** September 22, 2021

**Organizer:** Council of Institutional Investors

**End Date:** September 24, 2021

**Location:** Chicago, Illinois

**Alternative Date(s) & Location(s)** Sep 20 - 22 2022, Boston, Massachusetts

**Difficulty:** General

**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.

See website for agenda.

**Fees**

No charge for members.  
Please visit website for details.

**Contact**

Michael Miller  
Phone: 202.822.0800

**Email**

michael@cii.org

**Link:** [https://www.cii.org/ev\\_calendar\\_day.asp?date=9/22/2021&eventid=108](https://www.cii.org/ev_calendar_day.asp?date=9/22/2021&eventid=108)

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

**Start Date:** September 28, 2021

**Organizer:** California Association of Public Retirement Systems (CALAPRS)

**End Date:** October 01, 2021

**Location:** On-line

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

**Difficulty:** General

**Topic Area:** Board Governance

**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=1449784&group=>

**Conference : Trustees Masters Program**

**Start Date:** October 17, 2021

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

**End Date:** October 20, 2021

**Location:** Denver, Colorado

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

**Difficulty:** General

**Topic Area:** General

**Attendance:** Open To All

The Trustees Masters Program (TMP) is for advanced-level trustees who want to gain a deeper insight into their role as well as interact with peers.

The program is divided into two tiers to help further facilitate your ongoing education and recognition. Tiers one and two are required for course completion and to receive your TMP pin.

For more information, please visit the website.

**Fees**

Not yet available

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

**Link:** <https://www.ifebp.org/education/certificateprograms/tmp/Pages/trustees-masters-program-tmp-20d2.aspx>

**Conference :** Annual Employee Benefits Conference

**Start Date:** October 17, 2021

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

**End Date:** October 20, 2021

**Location:** Denver, Colorado

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

**Difficulty:** General

**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 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**

Not available.

**Contact**

Tel: (888) 334-3327

**Email**

edreg@ifebp.org

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

**Conference :** Annual Conference

**Start Date:** October 25, 2021

**Organizer:** International Corporate Governance Network (ICGN)

**End Date:** October 27, 2021

**Location:** Toronto, Ontario, Canada

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

**Difficulty:** General

**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**

£1,200 - non-member  
£600 - member

**Contact**

Flo Doe  
Senior Engagement Manager  
Phone: +44 (0) 202 7612 7011

**Email**

florence.doel@icgn.org

**Link:** <https://www.icgn.org/events/icgn-2021-annual-conference-toronto>

**Conference : Annual Institutional Investor Real Estate Conference**

**Start Date:** October 25, 2021

**Organizer:** Pension Real Estate Association (PREA)

**End Date:** October 27, 2021

**Location:** Chicago, Illinois

**Alternative Date(s)** Oct 19 - 21 2022, Washington, District of Columbia

**& Location(s)** Oct 18 - 20 2023, Boston, Massachusetts

**Difficulty:** Practitioner

**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.

**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 : Fall Conference**

**Start Date:** November 09, 2021

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

**End Date:** November 12, 2021

**Location:** Los Angeles, California

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

**& Location(s)**

**Difficulty:** General

**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.

**Contact**

Phone: 916-701-5158

**Email**

sacrs@sacrs.org

**Link:** <https://sacrs.org/Events/Fall-Conference>

**Conference :** 2022 Visions, Insights & Perspectives (VIP) Americas

**Start Date:** January 24, 2022

**Organizer:** Institutional Real Estate, Inc. (IREI)

**End Date:** January 26, 2022

**Location:** Carlsbad, California

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

**Difficulty:** Practitioner

**Topic Area:** Investments

**Attendance:** By Invitation Only

VIP delivers a quality agenda that is marketing-free. It upholds a strict ratio of 3 managers to every 1 investor. This ensures that attendees are able to really engage and get to know one another. Our audience is also capped so that the event is kept at a size that fosters relationship building. During the event there are several opportunities to socialize with attendees. Whether you are discussing critical industry issues as a part of a roundtable breakout session or at an off-site recreational activity, VIP gives you an excellent networking platform to establish new relationships and strengthen existing.

Registration is open to qualified investors and subscribers to the Institutional Real Estate Americas publication. To find out more details about registration and the publication, please contact the organizer.

**Fees**

Not available. Please contact conference organizer.

**Contact**

Lucero Jaramillo  
Conference Director  
Phone: +1 925-244-0500 ext.  
130

**Email**

[l.jaramillo@irei.com](mailto:l.jaramillo@irei.com)

**Link:** <https://irei.com/events/2022-visions-insights-perspectives-vip-americas/>

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

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