



The Cortex Report

Customized for the

San José Retirement Boards

May 2021

This page is intentionally left blank

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 order, and include information such as event name, event sponsor/provider, date, 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.

This page is intentionally left blank

Table of Contents

Start Date	Primary Organizer	Event	Location	Page
May 10, 2021	California Association of Public Retirement Systems (CALAPRS)	Trustees' Roundtable	On-line	1
May 10, 2021	Columbia Business School	Corporate Governance: Developing Exceptional Board Leaders	New York, New York	1
May 11, 2021	State Association of County Retirement Systems (SACRS)	Spring Conference	San Diego, California	2
May 12, 2021	International Corporate Governance Network (ICGN)	ICGN Governance, Stewardship & Sustainability Course	On-line	2
May 17, 2021	International Centre for Pension Management (ICPM)	Discussion Forum	On-line	3
May 17, 2021	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	On-line	3
May 17, 2021	Pensions & Investments	ESG Investing	On-line	4
May 18, 2021	The Conference Board	Leadership Development Conference	On-line	4
May 25, 2021	International Foundation of Employee Benefit Plans (IFEBC)	Annual Health Benefits Conference & Expo	Clearwater, Florida	5
Jun 14, 2021	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	On-line	5
Jun 14, 2021	Harvard Kennedy School	Leadership Decision Making: Optimizing Organizational Performance (Online)	On-line	6
Jun 14, 2021	Institute for Management Development (IMD) Business School	Strategy Governance for Boards	On-line	6 <i>New</i>
Jun 15, 2021	Pensions & Investments	Private Markets	On-line	7
Jun 20, 2021	CFA Institute	Investment Management Workshop	Boston, Massachusetts	7
Jun 21, 2021	Plan Sponsor	Plan Sponsor National Conference	On-line	8
Jun 24, 2021	Institutional Investor	Public Funds Roundtable	On-line	8
Jun 24, 2021	Institutional Investor	Virtual Roundtable for Public Pension Funds - June 2021	On-line	9 <i>New</i>
Jun 28, 2021	International Foundation of Employee Benefit Plans (IFEBC)	Advanced Trustees and Administrators Institute	On-line	9 <i>New</i>
Jul 12, 2021	Government Finance Officers Association (GFOA)	Virtual Conference	On-line	10
Jul 13, 2021	State Association of County Retirement Systems (SACRS)	Public Pension Investment Management Program	Berkeley, California	10
Jul 21, 2021	Harvard Business School	Audit Committees in a New Era of Governance	Boston, Massachusetts	11
Jul 27, 2021	Pension Bridge	Private Equity Exclusive	On-line	11
Aug 07, 2021	National Association of State Retirement Administrators (NASRA)	Annual Conference	Pittsburgh, Pennsylvania	12
Aug 23, 2021	National Conference on Public Employee Retirement Systems (NCPERS)	Public Pension Funding Forum	On-line	12
Sep 07, 2021	Harvard Business School	Governing for Nonprofit Excellence: Critical Issues for Board Leadership	Boston, Massachusetts	13

Table of Contents

Start Date	Primary Organizer	Event	Location	Page	
Sep 07, 2021	Harvard Business School	Making Corporate Boards More Effective	Boston, Massachusetts	13	New
Sep 22, 2021	Council of Institutional Investors	Fall Conference	Chicago, Illinois	14	
Sep 22, 2021	Columbia Business School	Corporate Governance: Developing Exceptional Board Leaders	On-line	1	
Sep 28, 2021	California Association of Public Retirement Systems (CALAPRS)	Principles of Pension Governance for Trustees	On-line	14	
Sep 29, 2021	Institutional Investor	Delivering Alpha	On-line	15	
Oct 04, 2021	Institute for Management Development (IMD) Business School	Digital Transformation for Boards	On-line	15	
Oct 06, 2021	Institute for Management Development (IMD) Business School	Board and Risk for Boards	On-line	16	
Oct 17, 2021	International Foundation of Employee Benefit Plans (IFEBC)	Trustees Masters Program	Denver, Colorado	16	
Oct 17, 2021	International Foundation of Employee Benefit Plans (IFEBC)	Annual Employee Benefits Conference	Denver, Colorado	17	
Oct 18, 2021	Pension Bridge	Alternatives Conference	On-line	17	
Oct 19, 2021	Institutional Real Estate, Inc. (IREI)	IREI : LIVE Defined Contribution	On-line	18	New
Oct 25, 2021	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Chicago, Illinois	18	
Oct 29, 2021	California Association of Public Retirement Systems (CALAPRS)	Trustees' Roundtable	On-line	1	
Nov 09, 2021	State Association of County Retirement Systems (SACRS)	Fall Conference	Los Angeles, California	19	
Jan 24, 2022	Institutional Real Estate, Inc. (IREI)	2022 Visions, Insights & Perspectives (VIP) Americas	Carlsbad, California	19	
Feb 26, 2022	National Association of State Retirement Administrators (NASRA)	Winter Meeting	Washington, District of	20	
Mar 07, 2022	Council of Institutional Investors	Spring Conference	Washington, District of	20	
Mar 30, 2022	California Association of Public Retirement Systems (CALAPRS)	Advanced Principles of Pension Governance for Trustees	Los Angeles, California	21	

Event Listings

Conference : Trustees' Roundtable

Start Date: May 10, 2021

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: May 10, 2021

Location: On-line

Alternative Date(s) & Location(s) Oct 29 2021, On-line

Difficulty: General

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.

Agenda not yet available. More information about the conference will be 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=1460401&group=>

Seminar : Corporate Governance: Developing Exceptional Board Leaders

Start Date: May 10, 2021

Organizer: Columbia Business School

End Date: May 14, 2021

Location: New York, New York

Alternative Date(s) & Location(s) Sep 22 - 24 2021, On-line

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

The Corporate Governance Program equips executives and professionals who currently serve or are interested in serving on corporate boards with the knowledge required to excel as stewards of shareholders that promote long-term and sustainable value creation.

Drawing on thought leadership from world-renowned experts at Columbia Business School and leading practicing directors, this program integrates academic research with a deep understanding of the emerging issues that boardrooms face. The program devotes one day entirely to emerging issues in the field of corporate governance, such as CEO succession plans, shareholder activism, the disruptive impact of technology and cyber risk, and the topic of diversity and inclusion. Program participants interact with round tables of top US directors, moderated by a Columbia Business School faculty expert in an engaging format.

For more information, please visit the website.

Fees

\$6,550

Contact

Yoon Lee
Director, Learning Solutions
+1 212-854-3390

Email

yoon.lee@gsb.columbia.edu

Link: <https://www8.gsb.columbia.edu/execed/program-pages/details/2548/CGP#overview>

Conference : Spring Conference

Start Date: May 11, 2021

Organizer: State Association of County Retirement Systems (SACRS)

End Date: May 14, 2021

Location: San Diego, California

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

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.
Last year's fees: \$120 - system
and other non-profit member
\$2,670 - non-member
Registration opens Jan 2020.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

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

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-may-2021>

Conference : Discussion Forum

Start Date: May 17, 2021

Organizer: International Centre for Pension Management (ICPM)

End Date: May 20, 2021

Location: On-line

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

Difficulty: Advanced

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.

Please visit the website for details.

Fees

\$6,575 CAD

Contact

Phone: 416.925.4153

Fax: 416.925.7377

Email

icpm@icpmnetwork.com

Link: <https://icpmnetwork.com/company/roster/companyRosterDetails.html?companyId=19493&companyRosterId=97>

Seminar : Private Equity: Investing and Creating Value

Start Date: May 17, 2021

Organizer: The Wharton School, University of Pennsylvania

End Date: May 28, 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

Organizer: Pensions & Investments

Location: On-line

Difficulty: General

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

Start Date: May 17, 2021

End Date: May 20, 2021

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 : Leadership Development Conference

Organizer: The Conference Board

Location: On-line

Difficulty: General

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

Start Date: May 18, 2021

End Date: May 19, 2021

Topic Area: Leadership

Attendance: Open To All

Some organizations and leaders within them have emerged stronger post-pandemic. What did they do to foster agility, remain resilient through change and handle new and different ways of working? What can you and your organization do to scale up the L&D function and promote leaders at all levels in a post-COVID world?

Attend the Leadership Development Conference to get answers to these questions, learn how to mobilize high-performing learners and advance your organization's leadership development journey in a way that leads to an elevated, inclusive organization in 2021 and beyond.

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>

Conference : Annual Health Benefits Conference & Expo

Start Date: May 25, 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>

Seminar : Investment Strategies and Portfolio Management

Start Date: June 14, 2021

Organizer: The Wharton School, University of Pennsylvania

End Date: June 18, 2021

Location: On-line

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

Difficulty: Practitioner

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

\$6,800

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

exced@wharton.upenn.edu

Link: <http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/investment-strategies-and-portfolio-management>

Seminar : Leadership Decision Making: Optimizing Organizational	Start Date: June 14, 2021
Organizer: Harvard Kennedy School	End Date: June 25, 2021
Location: On-line	Alternative Date(s) & Location(s) N/A
Difficulty: Intermediate	

Topic Area: Leadership **Attendance:** Open To All

Wise judgment and effective decision-making have always been essential skills for leaders across all professional settings. Today, leaders have access to mountains of data from endless sources. The question is, how can they leverage this abundance of information to make smarter decisions?

Leadership Decision Making (Online) features hands-on learning experiences that help leaders like you improve decision analysis and leadership effectiveness. During this ten-day intensive online program, you'll discover how to recognize biases in judgment that affect even the most intelligent individuals and to incorporate structured decision-making techniques empirically shown to enhance decision making. You'll also receive customized, confidential feedback on your decision-making style from the Harvard Decision Science Laboratory—one of the most popular aspects of the program.

See the website for more information about the program.

Fees

\$4,900.

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

Link: <https://www.hks.harvard.edu/educational-programs/executive-education/leadership-decision-making>

Seminar : Strategy Governance for Boards	Start Date: June 14, 2021
Organizer: Institute for Management Development (IMD) Business School	End Date: June 15, 2021
Location: On-line	Alternative Date(s) & Location(s) Jun 14 - 15 2021, Lausanne, Switzerland
Difficulty: General	

Topic Area: Board Governance **Attendance:** Open To All

This event will enable you to play a meaningful, advisory role in the governance of your firm's corporate strategy within the context of an increasingly digital landscape.

Specifically the program will help participants:

- Understand the role of boards in strategy formulation and validation
- Ensure that board governance mechanisms are connected to their firm's strategy
- Monitor their firm's strategy effectively within the context of a 'digital' age
- Strike the right balance between growing today's business and investing in emerging opportunities

See the website for more information about the program.

Fees

CHF 6,600

Contact

Didier Cossin,
Program Director
Phone: +41 (0)21 618 0111

Email

didier.cossin@imd.org

Link: <https://www.imd.org/sgb/strategy-governance-board-training/>

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 : Plan Sponsor National Conference

Start Date: June 21, 2021

Organizer: Plan Sponsor

End Date: June 24, 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 : 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 : Virtual Roundtable for Public Pension Funds - June 2021

Start Date: June 24, 2021

Organizer: Institutional Investor

End Date: June 24, 2021

Location: On-line

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

Difficulty: Intermediate

Topic Area: Pension Plan Benefit Policy

Attendance: By Invitation Only

Alternative Investor Institute & Institutional Investor institute's Virtual Roundtable for Public Pension Funds in June 2021 will 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. 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 : Advanced Trustees and Administrators Institute

Start Date: June 28, 2021

Organizer: International Foundation of Employee Benefit Plans (IFEBC)

End Date: June 30, 2021

Location: On-line

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

Difficulty: General

Topic Area: General

Attendance: Open To All

The Advanced Trustees and Administrators Institute is designed to keep experienced trustees informed of the latest industry trends, legal and regulatory changes, and best practices as well as bring new ideas to light. Attendees gain a deeper understanding of how to run their pension and health and welfare funds. Developed by active trustees, administrators and professional advisors, each session is designed to address the issues you face today and prepare you for what lies ahead. In these challenging times, you can count on the International Foundation to deliver timely, relevant and balanced education on the trends, issues and future direction of the industry.

More information about the conference is not yet available.

Fees

\$1,880 - non-member
\$1,550 - member

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/TrusteesAdmin/Pages/advanced-trustees-and-administrators-institute-2109.aspx>

Conference : Virtual Conference

Start Date: July 12, 2021

Organizer: Government Finance Officers Association (GFOA)

End Date: July 23, 2021

Location: On-line

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

Difficulty: General

Topic Area: General

Attendance: Open To All

GFOA's Annual Conference. Join this event to hear from leading practitioners, recognized industry experts, researchers, and your peers how to effectively prioritize the current needs of your community and prepare for any future challenges.

Please check website for updates.

Fees

Members - \$420
Non-members - \$575

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 13, 2021

Organizer: State Association of County Retirement Systems (SACRS)

End Date: July 22, 2021

Location: Berkeley, California

**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>

Seminar : Audit Committees in a New Era of Governance

Start Date: July 21, 2021

Organizer: Harvard Business School

End Date: July 23, 2021

Location: Boston, Massachusetts

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

Difficulty: General

Topic Area: Board Governance

Attendance: Open To All

This program explores the best practices that your audit committee can use to fulfill its mandate and increase its strategic contribution. You will acquire the frameworks to align corporate strategy with financial reporting—and help your company operate more effectively in today's rigorous market and regulatory environment. The program prepares you to manage the creative tension between the compliance and strategic roles of the audit committee. While improving your ability to ensure compliance, transparency, and accountability, you will learn how to move your company beyond a compliance mentality toward strategic financial reporting and effective risk management.

See the website for more information about the program.

Fees

\$6,800
Covers tuition, books, case materials, accommodation & most meals

Contact

Phone: +1-617-495-6555
Toll-free: 1-800-427-5577

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/audit-committees-new-era-governance/>

Conference : Private Equity Exclusive

Start Date: July 27, 2021

Organizer: Pension Bridge

End Date: July 29, 2021

Location: On-line

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

Difficulty: Advanced

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 Private Equity Exclusive annually 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

Phone: 561-455-2729

Email

info@pensionbridge.com

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

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 : Public Pension Funding Forum

Start Date: August 23, 2021

Organizer: National Conference on Public Employee Retirement Systems

End Date: August 24, 2021

Location: On-line

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

Difficulty: General

Topic Area: Pension Plan Policy

Attendance: Open To All

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

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

More information about the conference is not yet available.

Fees

Fund/Stakholder: \$250
Service Provider: \$300

Contact

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

Email

registration@ncpers.org

Link: <https://www.ncpers.org/funding-forum>

Seminar : Governing for Nonprofit Excellence: Critical Issues for Board**Start Date:** September 07, 2021**Organizer:** Harvard Business School**End Date:** September 10, 2021**Location:** Boston, Massachusetts**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** Board Governance**Attendance:** Open To All

This program delves into the critical issues facing nonprofit board leaders. You will examine the latest governance frameworks, performance and measurement systems, oversight models for ensuring accountability and compliance, and the dynamics between boards and CEOs. As you gain insight into four essential competencies of nonprofit governance—board leadership, strategic stewardship, performance measurement, and financial oversight—you will learn how to drive the strategic and organizational transformation that enables your nonprofit organization to thrive. With a deeper understanding of board roles and responsibilities, you will emerge a stronger leader and a more strategic steward for your organization.

See the website for more information about the program.

Fees

\$5,125
Covers tuition, books, case materials, accommodation & most meals

Contact

Phone: +1-617-495-6555
Toll-free: 1-800-427-5577

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/governing-nonprofit-excellence-critical-issues-board-leadership/>

Seminar : Making Corporate Boards More Effective**Start Date:** September 07, 2021**Organizer:** Harvard Business School**End Date:** September 10, 2021**Location:** Boston, Massachusetts**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** Board Governance**Attendance:** Open To All

This corporate governance program is based on the premise that there is no one best way for boards to operate—rather, each board must develop practices that suit the unique needs of its company and management. As you examine the latest thinking on the internal function of corporate boards, interaction with management, and overall board relations, you will discover how to enhance and focus your own board's efforts. In this board of directors education program, you will gain a deeper understanding of the board's responsibilities in areas such as financial resilience, strategic direction, executive compensation, and regulatory compliance. At the same time, you will learn how to work more effectively with fellow directors and company management to strengthen governance, manage unexpected crises, and make decisions that drive long-term corporate success.

See the website for more information about the program.

Fees

Not available.

Contact

Phone: +1-617-495-6555
Toll-free: 1-800-427-5577

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/governing-nonprofit-excellence-critical-issues-board-leadership/>

Conference : 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

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 : Delivering Alpha

Organizer: Institutional Investor

Location: On-line

Difficulty: Intermediate

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

Start Date: September 29, 2021

End Date: September 29, 2021

Topic Area: Investments

Attendance: By Invitation Only

This conference brings together the biggest names in the investment community from top institutional and sovereign funds, private equity, hedge funds and venture capital, as well as influential political and economic leaders. CNBC anchors and reporters will lead high-level discussions on the critical issues facing investors in today's global economy through virtual one-on-one interviews and panel sessions.

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.cnbc.events.com/delivering-alpha/>

Seminar : Digital Transformation for Boards

Organizer: Institute for Management Development (IMD) Business School

Location: On-line

Difficulty: General

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

Start Date: October 04, 2021

End Date: October 05, 2021

Topic Area: Board Governance

Attendance: Open To All

Digital Transformation for Boards brings you up-to-speed with the new digital landscape so you can make informed decisions and provide the best recommendations when evaluating digital opportunities and threats for your company.

You will develop a better understanding of the competencies and behaviors required to successfully lead in an environment characterized by digital disruption.

This course will help you:

- Grasp the potential impact of digital technologies on your company's performance
- Understand the new competitive dynamics disrupting your industry
- Identify the competencies and behaviors needed to lead successfully in a digital age
- Be prepared to advise and support your management on digital transformation

Note: This event is a hybrid format (may attend in-person in Lausanne, Switzerland or virtually).

Fees

CHF 6,600

Contact

Michael Wade, Program
Director
Phone: +41 (0)21 618 0111

Email

michael.wade@imd.org

Link: <https://www.imd.org/dtb/digital-transformation-for-board-members/>

Seminar : Board and Risk for Boards

Start Date: October 06, 2021

Organizer: Institute for Management Development (IMD) Business School

End Date: October 07, 2021

Location: On-line

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

Difficulty: General

Topic Area: Risk Management

Attendance: Open To All

Risk awareness and supervision are among the central duties of an effective board yet despite this important risk mission, many boards do not have a systematic risk approach.

This program is an opportunity for board members to develop this approach and to upgrade to best-in-class risk work while differentiating it from executive risk thinking.

This course will help you:

- Identify and assess your organization's risks
- Analyze how strategic risk can be assessed and managed
- Gain techniques for setting risk appetite
- Access the risk behaviors of the board and management

Note: This event is a hybrid format (may attend in-person in Lausanne, Switzerland or virtually).

Fees

CHF 6,600

Contact

Didier Cossin, Program Director
Phone: +41 (0)21 618 0111

Email

didier.cossin@imd.org

Link: <https://www.imd.org/brb/risk-for-board-members/>

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 : Alternatives Conference

Start Date: October 18, 2021

Organizer: Pension Bridge

End Date: October 19, 2021

Location: On-line

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

Difficulty: General

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 : IREI : LIVE | Defined Contribution

Start Date: October 19, 2021

Organizer: Institutional Real Estate, Inc. (IREI)

End Date: October 19, 2021

Location: On-line

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Not Yet Available

This event is part of a new Virtual Conference Series focusing on the most significant issues the industry is facing in today's climate.

IREI : LIVE's panels will feature the IREI commitment of a one-to-one LP/GP ratio on each panel with a combination of four to six GPs and LPs spread out over two or three panels per event.

Fees

Not available. Please contact conference organizer.

Contact

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

Email

l.jaramillo@irei.com

Link: <https://irei.com/events/irei-live-defined-contribution/>

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) & Location(s) Oct 19 - 21 2022, Washington, District of Columbia
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) & Location(s) N/A

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

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

Conference : Winter Meeting

Start Date: February 26, 2022

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: February 28, 2022

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: General

Attendance: Members Only

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

More information about the conference is not yet available.

Fees

Not yet available

Contact

Mary Hiatte

Tel: 202-624-1418

Email

mary@nasra.org

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

Conference : Spring Conference

Start Date: March 07, 2022

Organizer: Council of Institutional Investors

End Date: March 09, 2022

Location: Washington, District of Columbia

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

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.

More information about the conference is not yet available.

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=3/7/2022&eventid=109

Seminar : Advanced Principles of Pension Governance for Trustees

Start Date: March 30, 2022

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: April 01, 2022

Location: Los Angeles, California

**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=1449780&group=>

Terms and Conditions for use of the Cortex Report

1. The Cortex Report has been prepared for the exclusive use of the **San José Retirement Boards**, its board members, officers and staff, and may not be used or reproduced by any other parties.
2. Unless indicated otherwise, Cortex is not affiliated with any of the sponsors or organizers of the events listed in the Report. Also, the listing should not be taken as an endorsement of any of the events.
3. The Cortex Report is based on information provided by education event sponsors. Cortex is not responsible for any losses or damages due to reliance on any information that is published in this Report.

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

Cortex Applied Research Inc.
2489 Bloor Street West, Unit 304
Toronto Ontario M6S 1R6
Tel: (416) 967-0252 Fax: (416) 967-2711
e-mail: info@cortexconsulting.com