



# ***The Cortex Report***

**Customized for the**

**San José Retirement Boards**

**May 2021**

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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 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.

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# ***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**

yoan.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

**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 :** Leadership Development Conference

**Start Date:** May 18, 2021

**Organizer:** The Conference Board

**End Date:** May 19, 2021

**Location:** On-line

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

**Difficulty:** General

**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 (IFEBP)

**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**

execed@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**

**Start Date:** June 15, 2021

**Organizer:** Pensions & Investments

**End Date:** June 17, 2021

**Location:** On-line

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

**Difficulty:** Advanced

**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 there of
- 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**

**Start Date:** June 20, 2021

**Organizer:** CFA Institute

**End Date:** June 24, 2021

**Location:** Boston, Massachusetts

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

**Difficulty:** Advanced

**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 (IFEBP)

**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.

**Fees**

Not yet available

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.

**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.

**Fees**

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

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.

**Contact**

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

More information about the conference is not yet available.

**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](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**

**Start Date:** September 29, 2021

**Organizer:** Institutional Investor

**End Date:** September 29, 2021

**Location:** On-line

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

**Difficulty:** Intermediate

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

**Seminar : Digital Transformation for Boards**

**Start Date:** October 04, 2021

**Organizer:** Institute for Management Development (IMD) Business School

**End Date:** October 05, 2021

**Location:** On-line

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

**Difficulty:** General

**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 (IFEBC)

**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@ifebc.org

**Link:** <https://www.ifebc.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](mailto: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](mailto: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](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=>

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