



The Cortex Report

Customized for the

San José Retirement Boards

July 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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May 22, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Program for Advanced Trustee Studies (PATs)	Washington, District of	21	New
May 22, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference and Exhibition	Washington, District of	22	
Jun 05, 2022	Government Finance Officers Association (GFOA)	Annual Conference	Austin, Texas	22	

Event Listings

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

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

Conference : Sustainable Returns: ESG Investing**Start Date:** July 13, 2021**Organizer:** Institutional Investor**End Date:** July 13, 2021**Location:** New York, New York**Alternative Date(s) & Location(s)** N/A**Difficulty:** General**Topic Area:** ESG and ethical investing**Attendance:** By Invitation Only

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

Please visit the website for details.

Fees

No fee. Limited to "qualified" institutional investors.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Sustainable>Returns-ESG-Investing-2021>

Seminar : Audit Committees in a New Era of Governance**Start Date:** July 21, 2021**Organizer:** Harvard Business School**End Date:** July 23, 2021**Location:** On-line**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

\$5,700
Covers tuition, books,
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-virtual/>

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>

Seminar : Venture Capital

Start Date: August 16, 2021

Organizer: The Wharton School, University of Pennsylvania

End Date: August 27, 2021

Location: On-line

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Venture Capital, you will:

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

See the website for more information about the program.

Fees

\$9,950

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference : Public Pension Funding Forum

Start Date: August 22, 2021

Organizer: National Conference on Public Employee Retirement Systems

End Date: August 24, 2021

Location: New York, New York

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 : PRI Academic Week

Start Date: September 13, 2021

Organizer: Principles for Responsible Investment (PRI)

End Date: September 17, 2021

Location: On-line

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

The event brings together the latest research and insights on responsible investment practices in an accessible way and aims to bridge the gap between academic researchers in sustainability and investors leading the way in RI.

The findings from peer-reviewed research are presented by their authors and discussed by investment practitioners and academics. It offers a unique opportunity for academics and investors to engage with each other, learn and discuss the latest insights.

See the website for more information about the conference.

Fees

€125 + 20% VAT

Contact

Meegan Marais
Phone: +44 (0)20 3714 3141

Email

events@unpri.org

Link: <https://www.unpri.org/all-events-and-webinars/pri-academic-network-week-2021/5945.article>

Conference : PRI Academic Network Conference

Start Date: September 13, 2021

Organizer: Principles for Responsible Investment (PRI)

End Date: September 17, 2021

Location: On-line

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

The event brings together the latest research and insights on responsible investment practices in an accessible way and aims to bridge the gap between academic researchers in sustainability and investors leading the way in RI.

The findings from peer-reviewed research are presented by their authors and discussed by investment practitioners and academics. It offers a unique opportunity for academics and investors to engage with each other, learn and discuss the latest insights.

Please visit website for more details.

Fees

Not available. Please contact conference organizer.

Contact

Email

events@unpri.org

Link: <https://www.unpri.org/events/pri-academic-network-conference-2021/5945.article>

Seminar : ICGN Governance, Stewardship & Sustainability Course		Start Date: September 15, 2021
Organizer: International Corporate Governance Network (ICGN)		End Date: September 29, 2021
Location: On-line	Alternative Date(s) & Location(s) N/A	
Difficulty: General		
Topic Area: ESG and ethical investing		Attendance: Open To All
<p>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.</p> <p>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.</p> <p>This course will run throughout September on the 15th, 22nd, and 29th.</p> <p>For more information, please visit the website.</p>		<p>Fees</p> <p>£400 + 20% VAT - member £600 + 20% VAT - non-member</p> <p>Contact</p> <p>Flo Doe Senior Engagement Manager Phone: +44 (0) 202 7612 7011</p> <p>Email</p> <p>florence.doel@icgn.org</p>
Link: https://www.icgn.org/events/icgn-online-governance-stewardship-sustainability-course-may-2021		

Seminar : Corporate Governance: Developing Exceptional Board Leaders		Start Date: September 20, 2021
Organizer: Columbia Business School		End Date: September 24, 2021
Location: On-line	Alternative Date(s) & Location(s) Sep 20 - 24 2021, New York, New York	
Difficulty: General		
Topic Area: Corporate Governance		Attendance: Open To All
<p>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.</p> <p>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.</p> <p>For more information, please visit the website.</p>		<p>Fees</p> <p>\$6,550</p> <p>Contact</p> <p>Yoon Lee Director, Learning Solutions +1 212-854-3390</p> <p>Email</p> <p>yoan.lee@gsb.columbia.edu</p>
Link: https://www8.gsb.columbia.edu/execed/program-pages/details/2548/CGP#overview		

Conference : Fall Conference

Start Date: September 22, 2021

Organizer: Council of Institutional Investors

End Date: September 24, 2021

Location: Chicago, Illinois

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

& Location(s) Sep 20 - 22 2022, On-line

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.

Please note: This conference will be held virtually and, assuming local Covid-19 restrictions allow, with limited in-person attendance. Registration will open early in early summer. More information will be posted as soon as it becomes 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=9/22/2021&eventid=108

Conference : Institutional Investor Forum

Start Date: September 22, 2021

Organizer: Sovereign Wealth Fund Institute

End Date: September 23, 2021

Location: Austin, Texas

Alternative Date(s) N/A

& Location(s)

Difficulty: General

Topic Area: Investments

Attendance: Open To All

Planned: May 2021

The Sovereign Wealth Fund Institute (SWFI) is a global organization designed to study sovereign wealth funds, pensions, endowments, central banks and other long-term public investors in the areas of investing, asset allocation, risk, governance, economics, policy, trade and other relevant issues. This Forum is intended to be an information-driven, marketing-free forum exclusively for institutional investors to share insights. Discussions and presentations are purely educational.

More information about the Forum is not yet available.

Fees

No charge for institutional investors (sovereign wealth funds, public pension funds, permanent funds, central banks, etc.)

Contact

Phone: +1 1 (949) 228-4341

Email

events@swfinstitute.org

Link: <https://www.ifsummit.com/>

Seminar: Certificate Series - Retirement Plan Basics**Start Date:** September 27, 2021**Organizer:** International Foundation of Employee Benefit Plans (IFEBP)**End Date:** September 28, 2021**Location:** Orlando, Florida**Alternative Date(s)
& Location(s)** N/A**Difficulty:** General**Topic Area:** Pension Plan Benefit Policy**Attendance:** Open To All

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

Topics for this course include:

- Overview of Social Security
- Retirement plan philosophy
- Defined contribution plans
- Defined benefit plans
- Hybrid plans
- Legal/regulatory environment
- Distribution options
- Benefit design and financing issues

Fees

\$1,795 - non-member
\$1,575 - member
Early bird discount of \$300 if registered by Aug. 18, 2021.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/certificateseries/schedule/Pages/certificate-series-retirement-plan-basics-2157.aspx>

Seminar: Principles of Pension Governance for Trustees**Start Date:** September 27, 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.cnbcevents.com/delivering-alpha/>

Seminar : Certificate Series - Investment Basics

Start Date: September 29, 2021

Organizer: International Foundation of Employee Benefit Plans (IFEBC)

End Date: September 30, 2021

Location: Orlando, Florida

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

Topics include:

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

Fees

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

Early bird discount of \$300 if registered by Aug. 18, 2021.

Contact

Tel: (888) 334-3327

Email

edreg@ifebc.org

Link: <https://www.ifebc.org/education/certificateprograms/certificateprograms/schedule/Pages/certificate-series-investment-basics-2173.aspx>

Seminar : Private Equity: Investing and Creating Value		Start Date: October 04, 2021
Organizer: The Wharton School, University of Pennsylvania		End Date: October 15, 2021
Location: On-line	Alternative Date(s) & Location(s) N/A	
Difficulty: Practitioner		
Topic Area: Investments		Attendance: Open To All
<p>In Private Equity: Investing and Creating Value, you will:</p> <ul style="list-style-type: none"> • 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 <p>See the website for more information about the program.</p>		<p>Fees</p> <p>\$9,950 Fees include accommodations and meals.</p> <p>Contact</p> <p>Phone: 215.898.1776 Toll-free: 1.800.255.3932</p> <p>Email</p> <p>execed@wharton.upenn.edu</p>
Link: http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/private-equity-investing-and-creating-value		

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
<p>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.</p> <p>You will develop a better understanding of the competencies and behaviors required to successfully lead in an environment characterized by digital disruption.</p> <p>This course will help you:</p> <ul style="list-style-type: none"> • 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 <p>Note: This event is a hybrid format (may attend in-person in Lausanne, Switzerland or virtually).</p>		<p>Fees</p> <p>CHF 6,600</p> <p>Contact</p> <p>Michael Wade, Program Director Phone: +41 (0)21 618 0111</p> <p>Email</p> <p>michael.wade@imd.org</p>
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
<p>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.</p> <p>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.</p> <p>This course will help you:</p> <ul style="list-style-type: none"> • 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 <p>Note: This event is a hybrid format (may attend in-person in Lausanne, Switzerland or virtually).</p>		<p>Fees</p> <p>CHF 6,600</p> <p>Contact</p> <p>Didier Cossin, Program Director Phone: +41 (0)21 618 0111</p> <p>Email</p> <p>didier.cossin@imd.org</p>
Link: https://www.imd.org/brb/risk-for-board-members/		

Seminar : Investment Strategies and Portfolio Management		Start Date: October 11, 2021
Organizer: The Wharton School, University of Pennsylvania		End Date: October 15, 2021
Location: On-line	Alternative Date(s) & Location(s) N/A	
Difficulty: Practitioner		
Topic Area: Investments		Attendance: Open To All
<p>In Investment Strategies and Portfolio Management, you will:</p> <ul style="list-style-type: none"> - Receive new tools and techniques for creating profitable investment portfolios - Critically evaluate investment managers using the latest research - Gain a deeper understanding of how to account for financial risk, including the impact of unforeseen small-probability events like pandemics - Learn how to assess the stock market's reactions to events using behavioral finance principles - Get an expert view of the predicted length and shape of an economic recovery - Understand the macroeconomic outlook both in the U.S. and globally <p>See the website for more information about the program.</p>		<p>Fees</p> <p>\$8,500</p> <p>Contact</p> <p>Phone: 215.898.1776 Toll-free: 1.800.255.3932</p> <p>Email</p> <p>execed@wharton.upenn.edu</p>
Link: http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/investment-strategies-and-portfolio-management		

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

Start Date: October 16, 2021

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: October 17, 2021

Location: Denver, Colorado

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

Difficulty: General

Topic Area: Pension Plan Benefit Policy

Attendance: Open To All

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

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

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

Fees

\$1,475 - non-member
\$1,695 - member
Early bird discount of \$300 if registered by Sept. 7, 2021

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/capp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-capp-pension-part-i-2111.aspx>

Conference : Trustees Masters Program

Start Date: October 16, 2021

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: October 17, 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

\$2,070 - non-member
\$1,850 - member
Early bird discount of \$300 if registered by July 9, 2021

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/tmp/Pages/trustees-masters-program-tmp-21d2.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

MEMBERS ONLY
Member: \$1,925 USD
Early bird discount of \$300 if registered by July 7, 2021.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/usannual/Pages/annual-employee-benefits-conference-2101.aspx>

Conference : PRI in Person

Start Date: October 18, 2021

Organizer: Principles for Responsible Investment (PRI)

End Date: October 21, 2021

Location: On-line

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

Difficulty: Intermediate

Topic Area: ESG and ethical investing

Attendance: Open To All

The PRI is the world's leading proponent of responsible investment. It works to understand the investment implications of environmental, social and governance (ESG) factors and to support its international network of investor signatories in incorporating these factors into their investment and ownership decisions.

PRI in Person brings together PRI signatories and other investment professionals to learn, network and collaborate in person over several days. Attracting a diverse audience, it offers something to attendees at all stages of the responsible investment journey, giving them an opportunity to discuss topical issues and share experiences from their own organisation and reason with peers from around the world.

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Joanne Wackrill
Director of Events
Phone: +44 (0)20 3714 3177

Email

jo.wackrill@unpri.org

Link: <https://digitalconference.unpri.org/pri/>

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/page/1459367/conferences>

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) Oct 19 - 21 2022, Washington, District of Columbia

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

The Pension Real Estate Association (PREA) is a non-profit trade association for the global institutional real estate investment industry. PREA currently lists over 700 corporate member firms across the United States, Canada, Europe and Asia. Its members include public and corporate pension funds, endowments, foundations, Taft-Hartley funds, insurance companies, investment advisory firms, REITs, developers, real estate operating companies and industry service providers.

PREA holds two major conferences each year: the Spring Conference and the Annual Institutional Investor Real Estate Conference.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

Amy Laffargue
Director, Meetings and Events
Phone: 860-785-3846
Fax: 860-692-6351

Email

amy@prea.org

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

Conference : Trustees' Roundtable

Start Date: October 29, 2021

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: October 29, 2021

Location: On-line

Alternative Date(s) N/A

& Location(s)

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=1464748&group=>

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 : Fixed Income & Credit

Start Date: November 16, 2021

Organizer: Pensions & Investments

End Date: November 18, 2021

Location: On-line

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

Investors need assets that provide returns in a low-yield environment. Recent years have seen a major shift into private credit, strong interest in unconstrained fixed income, and growing interest in emerging markets and quant strategies. This conference will provide a survey of fixed income assets and strategies, and how they fit into a risk profile.

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Elayne Glick
Audience Development Director
Phone: (212) 210-0247

Email

eglick@pionline.com

Link: <https://conferences.pionline.com/conferences>

Seminar : CII & NYU Corporate Governance Bootcamp		Start Date: November 17, 2021
Organizer: Council of Institutional Investors		End Date: November 19, 2021
Location: On-line	Alternative Date(s) & Location(s) N/A	
Difficulty: General		
Topic Area: Corporate Governance		Attendance: Open To All
<p>CII is proud to offer Corporate Governance Bootcamp 2020, a premium online executive education program developed in partnership with New York University School of Law's Institute for Corporate Governance and Finance.</p> <p>Bootcamp 2020 is a two-track program, with an introductory session for those who are new to corporate governance and a deeper-dive curriculum to follow for governance professionals with some experience and participants who completed the introductory session. Instructors include faculty from NYU and the University of California at Berkeley, as well as seasoned practitioners. Click the green Curriculum and Schedule link to the right for more details.</p> <ul style="list-style-type: none"> • Bootcamp Basics – Introduction to Corporate Governance: \$245 for CII members, \$495 for non-members. • Program for Governance Professionals with Some Experience (beginners welcome, too): \$745 for CII members, \$945 for non-members. • Combined Program: \$945 for CII members, \$1,395 for non-members. 		<p>Fees</p> <p>Non-Members - \$1,395 Members - \$945 (Attendees may also attend only one out of the two sessions at a lower price)</p> <p>Contact</p> <p>Connor Garvey (202) 822-0800</p> <p>Email</p> <p>connor@cii.org</p>
Link: https://www.cii.org/ev_calendar_day.asp?date=11/17/2021&eventid=145		

Conference : Investing for Good USA		Start Date: December 02, 2021
Organizer: Financial Times (FT)		End Date: December 02, 2021
Location: On-line	Alternative Date(s) & Location(s) N/A	
Difficulty: General		
Topic Area: ESG and ethical investing		Attendance: Open To All
<p>While in the short term, the Covid-19 pandemic has focused attention on restoring public health and preserving the economy, the crisis has also raised awareness of the need to boost the green economy and build resilience ahead of another impending crisis: climate change. Meanwhile, with increasing evidence that investments that take climate stewardship into account can achieve superior financial performance, asset owners are pushing both the companies in their portfolios and the asset managers who manage those portfolios to develop strategies that reflect pressing climate realities. This conference will discuss the role the investment community can play in unleashing the financial flows that are urgently needed if we are to recover from the Covid-19 crisis while also avoiding the worst effects of climate change.</p> <p>See the website for more information about the conference.</p>		<p>Fees</p> <p>KNOWLEDGE PASS: \$299 PROFESSIONAL PASS: \$399 GROUP PASS: \$1995 EARLY BIRD PROFESSIONAL PASS: \$199 (ends Oct 22, 2021)</p> <p>Contact</p> <p>Phone: +44 (0) 207 775 6653</p> <p>Email</p> <p>ftlive@ft.com</p>
Link: https://investingforgoodus.live.ft.com/		

Conference : RI Digital: USA

Start Date: December 08, 2021

Organizer: Responsible Investor

End Date: December 08, 2021

Location: On-line

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

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

Please visit website for agenda.

Fees

No charge for asset owner and investment consultants.

Contact

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

Email

hamish@responsible-investor.com

Link: <https://mailchi.mp/fb31185c70c8/p2igmwioot>

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**
Organizer: California Association of Public Retirement Systems (CALAPRS)
Location: Los Angeles, California
Difficulty: General
Alternative Date(s) & Location(s) N/A

Start Date: March 30, 2022
End Date: April 01, 2022

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=>

Conference : **Program for Advanced Trustee Studies (PATs)**
Organizer: National Conference on Public Employee Retirement Systems
Location: Washington, District of Columbia
Difficulty: Intermediate
Alternative Date(s) & Location(s) N/A

Start Date: May 22, 2022
End Date: May 25, 2022

Topic Area: Board Governance

Attendance: Members Only

This program is designed for advanced trustees who seek a more intensive, in-depth learning experience. Held annually in conjunction with the Annual Conference & Exhibition, each year's program will focus on two topics of particular importance to pension plan trustees, enabling participants to dig deeper and fully explore issues with their counterparts from around the nation. Topics may include ethics, legal developments, and alternative investments, among other timely themes.

The program, developed more than a decade ago in consultation with Harvard Law School, is formatted to foster dialogue and interaction among attendees.

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

Fees

Not yet available.

Contact

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

Email

registration@ncpers.org

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

Conference : Annual Conference and Exhibition

Start Date: May 22, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 26, 2022

Location: Washington, District of Columbia

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

Difficulty: General

Topic Area: General

Attendance: Members Only

More than 900 trustees, administrators, state and local officials, investment, financial and union officers, pension staff and regulators attend this conference each year. Attendees benefit from the comprehensive educational programming, dynamic speakers, and networking opportunities with money managers, investment service providers and public fund colleagues from across the nation.

Attendees benefit from the comprehensive educational programming, dynamic speakers, and networking opportunities with money managers, investment service providers and public fund colleagues from across the nation.

For more information, please visit the website.

Fees

Not yet available.

Contact

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

Email

registration@ncpers.org

Link: <https://www.ncpers.org/annual-conference>

Conference : Annual Conference

Start Date: June 05, 2022

Organizer: Government Finance Officers Association (GFOA)

End Date: June 08, 2022

Location: Austin, Texas

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

Difficulty: General

Topic Area: General

Attendance: Open To All

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

Please check website for updates.

Fees

Not available. Please contact conference organizer.

Contact

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

Email

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

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