



The Cortex Report

Customized for the

San José Retirement Boards

September 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

Seminar : Global Asset Allocation

Start Date: September 02, 2021

Organizer: BCA Research

End Date: September 02, 2021

Location: On-line

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

BCA has been an independent provider of global investment research for over 65 years. Markets are, to use Paul Samuelson's phrase, "micro efficient but macro inefficient." CIOs, asset allocators, and investment professionals often struggle to find a practical way to construct optimal multi-asset portfolios. This course will help you:

- Learn methods and strategies to harvest alpha from these macro inefficiencies.
- Identify portfolio objectives as a starting point for successful asset allocation strategies.
- Match the macro environment with the appropriate asset allocation strategies - often the most challenging part of the investment process.
- Become more effective at interpreting how BCA's Global Asset Allocation team sees the world; an important input given the increasingly complex macro environment.
- Gain a better understanding of how to develop and execute asset allocation strategies, and how investors should be positioned given prevailing market conditions.

The course comprises two 1-hour sessions per week for 4 weeks (Tuesday and Thursday).

Fees

\$1,888

Contact

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

Email

academy@bcaresearch.com

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

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

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 September on the 15th, 22nd, and 29th.

For more information, please visit the website.

Fees

£400 + 20% VAT - member
£600 + 20% VAT - non-member

Contact

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Senior Engagement Manager
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Email

florence.doel@icgn.org

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) N/A

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

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yoan.lee@gsb.columbia.edu

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

Seminar : Leadership Decision Making: Optimizing Organizational

Start Date: September 20, 2021

Organizer: Harvard Kennedy School

End Date: October 01, 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

\$4,950

Application deadline:
August 30, 2021

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

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, Boston

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

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 : Principles of Pension Governance for Trustees

Start Date: September 28, 2021

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: September 30, 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

\$595 USD

Contact

Email

events@cnbc.com

Link: <https://www.cnbc.com/delivering-alpha/>

Seminar : Certificate Series - Investment Basics

Start Date: September 29, 2021

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

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@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/certificate-series/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) Mar 14 - 18 2022, Philadelphia, Pennsylvania

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

\$9,950
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>

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/>

Seminar : Investment Strategies and Portfolio Management

Start Date: October 11, 2021

Organizer: The Wharton School, University of Pennsylvania

End Date: October 15, 2021

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Apr 4 - 8 2022, On-line

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:

- 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

See the website for more information about the program.

Fees

\$11,280

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>

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 : Investment Conference

Start Date: October 19, 2021

Organizer: BCA Research

End Date: October 22, 2021

Location: On-line

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

BCA is an independent provider of global investment research. Since 1949, its mission has been to support its clients in making better investment decisions through the delivery of leading-edge analysis and forecasts of all the major asset classes and economies, as well as educating, informing and stimulating discussion through clear and thought-provoking research.

The 42nd Annual Global Investment Conference will take place as a virtual event on October 19-22, 2021. The conference will bring together a robust line up of speakers and agenda topics that will provide attendees the insights to shape their investment conviction.

See the website for more information about the conference.

Fees

\$1795 (Discounts available for clients and past attendees.)

Contact

Phone: +1 514 499 9706
Toll-free: 1 800 724 2942

Email

support@bcaresearch.com

Link: <https://www.bcaresearch.com/conference2020>

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: Open To All

Institutional Real Estate, Inc. is excited to announce its newest initiative, IREI : LIVE! A new Virtual Conference Series focusing on the most significant issues the industry is facing in today's climate. IREI : LIVE will be produced seven times in 2021. The series will start in May.

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.

The live panels will be tailored to topics that are pertinent to each individual firm's expertise and knowledge so that you can demonstrate your wisdom on a series of topics, which include: Future of Offices, Debt, Future of Logistics and Retail, Life Sciences, Defined Contribution, Data Centers, Diversity, Equity & Inclusion, and Multifamily.

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 Conference

Start Date: October 25, 2021

Organizer: International Corporate Governance Network (ICGN)

End Date: October 27, 2021

Location: Toronto, Ontario, Canada

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

This conference will be hosted by the Ontario Teachers Pension Plan.

Over 500 influential governance professionals will convene in Toronto to discuss developments in corporate governance from an international perspective. As the governance and investor stewardship landscape continues to evolve, our leading expert speakers will provide attendees with key insights into best practice and highlight future priorities for companies, investors and stakeholders.

Please check the website for more information.

Fees

Not available.

Contact

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

Email

florence.doel@icgn.org

Link: [file:///C:/Users/Emily/Downloads/Toronto%20Annual%20Conference%20Sponsorship%20Flyer_0%20\(1\).pdf](file:///C:/Users/Emily/Downloads/Toronto%20Annual%20Conference%20Sponsorship%20Flyer_0%20(1).pdf)

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

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 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 : Alternatives Conference

Start Date: November 01, 2021

Organizer: Pension Bridge

End Date: November 02, 2021

Location: Los Angeles, California

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 : Sustainable Returns: ESG Investing

Start Date: November 03, 2021

Organizer: Institutional Investor

End Date: November 04, 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>

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: New York, New York

Alternative Date(s) & Location(s) Nov 16 - 18 2021, On-line

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.

This event will survey the fixed income market from triple A to Z with thought leaders tackling the major questions that face investors as they look to get more out of their fixed income allocations.

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

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

Email

eglick@pionline.com

Link: <https://conferences.pionline.com/conference/fixed-income/2021>

Conference : IREI : LIVE | Data Centers

Start Date: November 16, 2021

Organizer: Institutional Real Estate, Inc. (IREI)

End Date: November 16, 2021

Location: On-line

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

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Fees

Not available. Please contact conference organizer.

Contact

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Phone: +1 925-244-0500 ext. 130

Email

l.jaramillo@irei.com

Link: <https://irei.com/events/irei-live-data-centers/>

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) Nov 17 - 19 2021, New York

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

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.

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.

- 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.

Fees

Non-Members - \$1,395
Members - \$945
(Attendees may also attend only one out of the two sessions at a lower price)

Contact

Connor Garvey
(202) 822-0800

Email

connor@cii.org

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

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

See the website for more information about the conference.

Fees

KNOWLEDGE PASS: \$299
PROFESSIONAL PASS: \$399
GROUP PASS: \$1995
EARLY BIRD PROFESSIONAL PASS: \$199 (ends Oct 22, 2021)

Contact

Phone: +44 (0) 207 775 6653

Email

ftlive@ft.com

Link: <https://investingforgoodus.live.ft.com/>

Conference : RI Digital: USA

Start Date: December 07, 2021

Organizer: Responsible Investor

End Date: December 09, 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

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Events Leader, Americas
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Email

hamish@responsible-investor.com

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

Conference : IREI : LIVE | Future of Logistics & Retail

Start Date: December 14, 2021

Organizer: Institutional Real Estate, Inc. (IREI)

End Date: December 14, 2021

Location: On-line

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

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Fees

Not available. Please contact conference organizer.

Contact

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Phone: +1 925-244-0500 ext. 130

Email

l.jaramillo@irei.com

Link: <https://irei.com/events/irei-live-future-logistics-retail/>

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

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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 : Annual Health Benefits Conference & Expo

Start Date: January 31, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: February 02, 2022

Location: Clearwater, Florida

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

Difficulty: General

Topic Area: Healthcare Management

Attendance: Open To All

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

For more information, visit the website.

Fees

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

Check website for more options.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

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

Conference : 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>

Seminar : Mobilizing Your Nonprofit Board

Start Date: March 07, 2022

Organizer: Harvard Kennedy School

End Date: May 06, 2022

Location: On-line

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

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

Fees

\$2,600
Application deadline:
February 14, 2022

The program explores four key topics:

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

Contact

Phone: +1-617-496-9000

See the website for more information about the program.

Email

exed@hks.harvard.edu

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

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.

Fees

No charge for members.
Please visit website for details.

More information about the conference is not yet available.

Contact

Michael Miller
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Email

michael@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=3/7/2022&eventid=109

Conference : PREA Spring Conference

Start Date: March 23, 2022

Organizer: Pension Real Estate Association (PREA)

End Date: March 24, 2022

Location: Seattle, Washington

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

Difficulty: Advanced

Topic Area: Investments

Attendance: Open To All

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

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

See the website for more information about the program.

Fees

Not yet available.

Contact

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

Email

amy@prea.org

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

Seminar : 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=>

Conference : Program for Advanced Trustee Studies (PATS)

Start Date: May 22, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 25, 2022

Location: Washington, District of Columbia

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

Difficulty: Intermediate

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 25, 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.

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

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