



The Cortex Report

Customized for the

San José Retirement Boards

November 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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Table of Contents

Start Date	Primary Organizer	Event	Location	Page	
Nov 01, 2021	Pension Bridge	Alternatives Conference	Los Angeles, California	1	
Nov 03, 2021	Institutional Investor	Sustainable Returns: ESG Investing	New York, New York	1	
Nov 03, 2021	International Corporate Governance Network (ICGN)	Global Virtual Summit	On-line	2	<i>New</i>
Nov 09, 2021	State Association of County Retirement Systems (SACRS)	Fall Conference	Los Angeles, California	2	
Nov 15, 2021	International Centre for Pension Management (ICPM)	Discussion Forum	On-line	3	<i>New</i>
Nov 16, 2021	Pensions & Investments	Fixed Income & Credit	New York, New York	3	
Nov 16, 2021	Institutional Real Estate, Inc. (IREI)	IREI : LIVE Data Centers	On-line	4	
Nov 17, 2021	Council of Institutional Investors	CII & NYU Corporate Governance Bootcamp	On-line	4	
Nov 17, 2021	Pensions & Investments	Fixed Income & Credit	On-line	3	
Dec 02, 2021	Financial Times (FT)	Investing for Good USA	On-line	5	
Dec 07, 2021	Responsible Investor	RI Digital: USA	On-line	5	
Dec 14, 2021	Institutional Real Estate, Inc. (IREI)	IREI : LIVE Future of Logistics & Retail	On-line	6	
Jan 10, 2022	Harvard Kennedy School	Leadership Decision Making: Optimizing Organizational Performance (Online)	On-line	6	<i>New</i>
Jan 24, 2022	Institutional Real Estate, Inc. (IREI)	2022 Visions, Insights & Perspectives (VIP) Americas	Carlsbad, California	7	
Jan 31, 2022	International Foundation of Employee Benefit Plans (IFEBCP)	Annual Health Benefits Conference & Expo	Clearwater, Florida	7	
Feb 22, 2022	Pension Bridge	ESG Summit	San Diego, California	8	<i>New</i>
Feb 26, 2022	National Association of State Retirement Administrators (NASRA)	Winter Meeting	Washington, District of	8	
Feb 28, 2022	International Foundation of Employee Benefit Plans (IFEBCP)	Certificate Series - Investment Basics	San Diego, California	9	<i>New</i>
Feb 28, 2022	International Foundation of Employee Benefit Plans (IFEBCP)	Certificate Series - Retirement Plan Basics	San Diego, California	9	<i>New</i>
Mar 05, 2022	California Association of Public Retirement Systems (CALAPRS)	General Assembly	On-line	10	<i>New</i>
Mar 07, 2022	Harvard Kennedy School	Mobilizing Your Nonprofit Board	On-line	10	
Mar 07, 2022	Council of Institutional Investors	Spring Conference	Washington, District of	11	
Mar 14, 2022	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia, Pennsylvania	11	
Mar 23, 2022	Pension Real Estate Association (PREA)	PREA Spring Conference	Seattle, Washington	12	
Mar 30, 2022	California Association of Public Retirement Systems (CALAPRS)	Advanced Principles of Pension Governance for Trustees	Los Angeles, California	12	

Table of Contents

Start Date	Primary Organizer	Event	Location	Page	
Apr 04, 2022	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	On-line	13	
May 09, 2022	Institute for Management Development (IMD) Business School	Digital Transformation for Boards	On-line	13	<i>New</i>
May 13, 2022	Institute for Management Development (IMD) Business School	Strategy Governance for Boards	On-line	14	<i>New</i>
May 22, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Program for Advanced Trustee Studies (PATs)	Washington, District of	14	
May 22, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference and Exhibition	Washington, District of	15	
May 23, 2022	International Foundation of Employee Benefit Plans (IFEBC)	Washington Legislative Update	On-line	15	<i>New</i>
Jun 05, 2022	Government Finance Officers Association (GFOA)	Virtual Conference	On-line	16	
Jun 05, 2022	Government Finance Officers Association (GFOA)	Annual Conference	Austin, Texas	16	
Jun 13, 2022	Institute for Management Development (IMD) Business School	Board and Risk for Boards	On-line	17	<i>New</i>
Oct 07, 2022	Institute for Management Development (IMD) Business School	Digital Transformation for Boards	On-line	13	<i>New</i>
Oct 19, 2022	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Washington, District of	17	
Oct 25, 2022	National Conference on Public Employee Retirement Systems (NCPERS)	Public Safety Conference	Nashville, Tennessee	18	

Event Listings

Conference : Alternatives Conference

Start Date: November 01, 2021

Organizer: Pension Bridge

End Date: November 03, 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

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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

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Email

kstorfer@institutionalinvestor.com

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

Conference : Global Virtual Summit

Start Date: November 03, 2021

Organizer: International Corporate Governance Network (ICGN)

End Date: November 03, 2021

Location: On-line

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

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

CGN's Global Virtual Summit returns for 2021, looking at the future of corporate governance in capital markets, considering human capital, natural capital, considering new revisions to ICGN's seminal guidance - the Model Mandate, in partnership with the United Nations Global Investors for Sustainable Development Alliance. The event will also cover incentives across the investment chain needed to achieve the UN SDGs, global sustainability-related disclosures and restoring trust and audit quality.

This event offers the perfect opportunity to get a global overview of the latest developments and practices, from senior investment governance practitioners. You can share your views, ask questions, find further resources by participating live or watching recordings, as suits your schedule.

See the website for more information about the conference.

Fees

£115 - non-member
£75 - member
Exclusive of 20% VAT

Contact

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Email

florence.doel@icgn.org

Link: <https://www.icgn.org/events/icgn-global-virtual-summit-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 : Discussion Forum

Start Date: November 15, 2021

Organizer: International Centre for Pension Management (ICPM)

End Date: November 18, 2021

Location: On-line

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

Difficulty: Advanced

Topic Area: General

Attendance: By Invitation Only

ICPM organizes two Discussion Forums each year that bring together ICPM's Research Partners with leading authorities from academia and policy-making circles to network and build knowledge about critical issues facing the pension system. Held in different parts of the world, Discussion Forums provide a collegial setting for senior executives in the ICPM network and other distinguished pension and investment practitioners to exchange ideas on key pension management topics. In addition, these events feature presentations by academic researchers on findings from ICPM-sponsored research. Research papers, presentation materials and case studies presented at past Discussion Forums are available as a resource for ICPM's Research Partners on global best practices. Summaries of key insights are also provided.

Please visit the website for details.

Fees

\$6,575 CAD

Contact

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Email

icpm@icpmnetwork.com

Link: <https://icpmnetwork.com/company/roster/companyRosterDetails.html?companyId=19681&companyRosterId=97>

Conference : Fixed Income & Credit

Start Date: November 16, 2021

Organizer: Pensions & Investments

End Date: November 16, 2021

Location: New York, New York

Alternative Date(s) & Location(s) Nov 17 - 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

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Audience Development Director
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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

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-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) N/A

Difficulty: General

Topic Area: Corporate Governance

Attendance: Open To All

CII is proud to offer Corporate Governance Bootcamp 2021, a premium executive education program developed in partnership with New York University School of Law's Institute for Corporate Governance and Finance.

Bootcamp 2021 is a two-track program, with an introductory session, Bootcamp Basics, 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 Bootcamp Basics. Instructors include faculty from NYU as well as seasoned practitioners

- 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%2F17%2F21&eventid=154

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

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

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Email

l.jaramillo@irei.com

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

Seminar : Leadership Decision Making: Optimizing Organizational

Start Date: January 10, 2022

Organizer: Harvard Kennedy School

End Date: January 21, 2022

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 myriad 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.

See the website for more information about the program.

Fees

\$4,950

Application deadline:
December 20, 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 : 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 : ESG Summit

Start Date: February 22, 2022

Organizer: Pension Bridge

End Date: February 23, 2022

Location: San Diego, California

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

Difficulty: General

Topic Area: ESG and ethical investing

Attendance: Open To All

Over the past five years, the importance of ESG has grown exponentially within the investment industry across the globe, with Morningstar recently reporting growth in ESG focused funds for the fifth consecutive quarter, to over \$2.3 trillion in Q2 2021, and Bloomberg predicting that global ESG assets will exceed \$53 trillion by 2025. Whilst Europe leads the way, the US is expected to expand quickly within this sector, dominating it over the next months and years. Responsible investing is, however, not only limited to environmental issues. In the wake of 2020, the world experienced a seismic cultural shift that has never been seen before, culminating in an urgency for the improvement of racial and gender equality on a global basis. Prioritizing diversity, equity and inclusion in the workplace is now seen as paramount, with research proving that firms with diverse leadership teams consistently outperform those that don't. Join us in San Diego, as we bring together an audience of 300 investment professionals from North America's top institutional investors, investment consultants and asset managers, for insightful conversations and in-depth knowledge sharing, to gain tangible action points that can be implemented into your investments. See the website for more info.

Fees

Not available. Please contact the conference organizer.

Contact

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Email

rinstance@pensionbridge.com

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

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

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Email

mary@nasra.org

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

Seminar : Certificate Series - Investment Basics

Start Date: February 28, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: March 05, 2022

Location: San Diego, California

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/certificateprograms/certificateprograms/schedule/Pages/certificate-series-investment-basics-2173.aspx>

Seminar : Certificate Series - Retirement Plan Basics

Start Date: February 28, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: March 05, 2022

Location: San Diego, California

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/certificateprograms/certificateprograms/schedule/Pages/certificate-series-retirement-plan-basics-2157.aspx>

Conference : General Assembly

Start Date: March 05, 2022

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 08, 2022

Location: On-line

Alternative Date(s) Mar 4 - 7 2023, Monterey, California

& Location(s) Mar 2 - 5 2024, Rancho Mirage, California

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.

The General Assembly is an educational conference for retirement system trustees, senior staff, and annual sponsors of CALAPRS.

More information about the conference is available exclusively to CALAPRS member systems and sponsors. Please visit the website and log in.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 415-764-4860
Toll-free: 1-800-RETIRE-0
Fax: 415-764-4915

Email

info@calaprs.org

Link: <https://www.calaprs.org/page/generalassembly>

Seminar : Mobilizing Your Nonprofit Board

Start Date: March 07, 2022

Organizer: Harvard Kennedy School

End Date: May 06, 2022

Location: On-line

Alternative Date(s) N/A

& Location(s)

Difficulty: General

Topic Area: Investments

Attendance: Open To All

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

The program explores four key topics:

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

See the website for more information about the program.

Fees

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

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

Conference : 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 : Private Equity: Investing and Creating Value

Start Date: March 14, 2022

Organizer: The Wharton School, University of Pennsylvania

End Date: March 18, 2022

Location: Philadelphia, Pennsylvania

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Private Equity: Investing and Creating Value, you will:

- Learn the various stages of investment, from deal origination through harvesting returns
- Study tools that private equity firms use to structure and finance a deal, create value, and determine exit timing
- Understand the key drivers in the private equity market, and key differences between funds' strategies
- Analyze a deal from the different points of view of a private equity firm and a bank
- Work in teams to review actual deal scenarios, both middle market and megafund, and debate recommendations with faculty and peers for new perspective
- Gain experience in navigating the complex arena of global private equity and emerging markets

See the website for more information about the program.

Fees

\$11,280
Fees include accommodations and meals.

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: <http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/private-equity-investing-and-creating-value>

Conference : 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=>

Seminar : Investment Strategies and Portfolio Management

Start Date: April 04, 2022

Organizer: The Wharton School, University of Pennsylvania

End Date: April 08, 2022

Location: On-line

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

Difficulty: Practitioner

Topic Area: Investments

Attendance: Open To All

In Investment Strategies and Portfolio Management, you will:

- 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

\$8,500

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Seminar : Digital Transformation for Boards

Start Date: May 09, 2022

Organizer: Institute for Management Development (IMD) Business School

End Date: May 10, 2022

Location: On-line

Alternative Date(s) & Location(s) Oct 7 - 8 2022, On-line

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 : Strategy Governance for Boards

Start Date: May 13, 2022

Organizer: Institute for Management Development (IMD) Business School

End Date: May 14, 2022

Location: On-line

Alternative Date(s) & Location(s) Nov 25 - 26 2022, On-line

Difficulty: General

Topic Area: Board Governance

Attendance: Open To All

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

Specifically the program will help participants:

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

See the website for more information about the program.

Fees

CHF 6,600

Contact

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

Email

didier.cossin@imd.org

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

Conference : 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.

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 : Washington Legislative Update

Start Date: May 23, 2022

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: May 24, 2022

Location: On-line

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

Difficulty: General

Topic Area: Legislation

Attendance: Open To All

Attend the Washington Legislative Update to stay informed about the evolving agenda that is currently under development to understand when and how changes may impact your plans and plan participants. Developed in partnership with an elite group of Washington insiders, this conference features topics of relevance, expert speakers and the most up-to-date information. **BENEFITS OF ATTENDING:** Access a direct pipeline to what's happening on the Hill and in key agencies; Hear from expert speakers about the issues, trends and future direction of the industry; Prepare for the future and learn how your plans may be impacted by the new administration as well as recently enacted and proposed legislation and regulations; Connect with peers facing similar challenges; Take away creative ideas and solutions that work. **WHO SHOULD ATTEND:** The content of this program is designed for trustees, administrators and plan professionals in the following areas: Those whose roles require a keen knowledge of legislative and governmental activity; Employee benefit representatives who are responsible for strategic change; Others serving multiemployer, single employer and public sector benefit plans. See website for more details.

Fees

\$1,800 - non-members
\$1,580 - members
Early bird discount of \$300.

Contact

Tel: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/virtual-conferences/Pages/washington-legislative-updated-virtual-conference.aspx>

Conference : Virtual Conference

Start Date: June 05, 2022

Organizer: Government Finance Officers Association (GFOA)

End Date: June 08, 2022

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>

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>

Seminar : Board and Risk for Boards

Start Date: June 13, 2022

Organizer: Institute for Management Development (IMD) Business School

End Date: June 14, 2022

Location: On-line

Alternative Date(s) & Location(s) Nov 23 - 24 2022, On-line

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

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Email

didier.cossin@imd.org

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

Conference : Annual Institutional Investor Real Estate Conference

Start Date: October 19, 2022

Organizer: Pension Real Estate Association (PREA)

End Date: October 21, 2022

Location: Washington, District of Columbia

Alternative Date(s) & 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 : Public Safety Conference

Start Date: October 25, 2022

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 28, 2022

Location: Nashville, Tennessee

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

Difficulty: General

Topic Area: General

Attendance: Members Only

This conference is dedicated to providing quality education that is specifically tailored for the unique needs and demands of public safety pensions. Since 1985, it has educated hundreds of public safety pension trustees, administrators and staff; union officials; and local elected officials by featuring presentations from recognized leaders in both the worlds of finance and politics, providing news on the latest developments, and offering attendees the opportunity to network with fellow trustees.

More information about the conference is not yet available.

Fees

\$715

Contact

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Email

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

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