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Trustee Essentials Training 2026 (formerly TEDS)

📅 Saturday, May 16, 2026
 at 8:00 AM (PDT) to Sunday, May 17, 2026 at 1:30 PM (PDT)
 📍 Caesars Palace
 3570 S Las Vegas Blvd, Las Vegas, NV 89109
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Menu

SATURDAY, MAY 16

- 6:30 AM–2:00 PM REGISTRATION
- 6:30 AM–8:00 AM BREAKFAST
- 8:00 AM–1:15 PM DAY 1 - GENERAL SESSION
- 8:15 AM–9:00 AM *Plan Governance: Roles of Trustees and Staff*

In this session, trustees will gain a comprehensive understanding of plan governance, focusing on the distinct roles and responsibilities of trustees and staff. This session will empower trustees to effectively collaborate with staff, ensuring sound governance and enhancing the overall success of their pension plans.
- 9:00 AM–9:45 AM *Navigating Your Investment Role as a Trustee*

Becoming a trustee can be exciting and terrifying at the same time. Serving as a fiduciary is a tremendous responsibility as you are now tasked with making decisions that have a direct impact on the lives of fund beneficiaries. This session will explore fundamental concepts that can help guide you in your role as a Trustee and serve as a framework for an investment program of any size.
- 9:45 AM–10:00 AM REFRESHMENT BREAK
- 10:00 AM–11:00 AM *Investments 101: Fixed Income & Public Equities*

This session introduces trustees to the fundamentals of fixed income and public equities. Participants will learn about bond types, valuation methods, yield metrics, and interest rate sensitivity. The course also covers key risks, investment strategies, and how managers align portfolios with client goals. Additionally, trustees will gain a foundational understanding of stocks, market capitalization categories, active

ACE 2026 Information
 (<https://www.ncpers.org/2026-annual-conference>)

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	vs. passive strategies, and selecting benchmarks for evaluating performance.
11:00 AM–12:00 PM	<i>Understanding Your Actuarial Funding Policy</i>
	Public pension trustees are advised by their actuaries on two main actuarial decision areas: selecting actuarial assumptions and setting an actuarial funding policy. This session introduces the components of an actuarial funding policy, then drills down on the mechanics of smoothing market value asset volatility and paying off any unfunded actuarial accrued liability.
12:00 PM–12:15 PM	REFRESHMENT BREAK
12:15 PM–1:15 PM	<i>Investments 201: Alternatives</i>
	What is an alternative investment? This session will define what makes an investment alternative as well as discuss subsets of alternative investments such as hedge funds and private equity, among others. Additionally, tips and methods for navigating the alternative asset manager due diligence process will be shared.
4:00 PM–5:30 PM	UNIVERSITY NETWORKING
	RECEPTION
	<i>SUNDAY, MAY 17</i>
7:00 AM–2:00 PM	REGISTRATION
7:00 AM–8:00 AM	BREAKFAST
8:00 AM–1:15 PM	DAY 2 – GENERAL SESSION
8:00 AM–8:30 AM	<i>The Nuts & Bolts of Fiduciary Duties</i>
	This session will explore what it means to be a good fiduciary from the perspective of legal issues that can arise including: plan governance, privilege issues, conflicts of interest, regulatory matters, open meetings, and public records.
8:30 AM–9:30 AM	<i>Back to Basics: Actuarial Valuations</i>
	This session will cover the fundamental concepts of actuarial valuations. An overview of actuarial assumptions, different actuarial cost methods, commonly employed policies/practices that impact contribution rate development, and explanations of terms regularly used in an actuarial valuation report will be discussed.
9:30 AM–9:45 AM	REFRESHMENT BREAK
9:45 AM–10:30 AM	TBD
10:30 AM–11:15 AM	TBD
11:15 AM–11:30 AM	REFRESHMENT BREAK
11:30 AM–1:00 PM	<i>Asset Allocation Challenge</i>
	(Interactive computer-based investment training session) Learn how to build a successful portfolio through a hands-on workshop and interactive game.

1:00 PM–1:15 PM *What's Next? Continued Learning*

Discover the path forward for continued learning in pension fund governance with this session, which will spotlight the [NCPERS Advanced Fiduciary Institute](https://ncpers.org/advanced-fiduciary-institute) (<https://ncpers.org/advanced-fiduciary-institute>).

SPEAKERS *Peter Landers, Global Governance Advisors*

Brad Kelly, Global Governance Advisors

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