



Aon Consulting, Inc.

2026 – Q3 Upcoming Educational Conferences

City of San Jose Retirement Boards

June 2026

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2026 Events

2026 Event Title – Organizer, Date, and Location	Overview and Audience
Annual Institutional Summer Retreat – Markets Group 07/13-25/2026 Park City, UT	The Institutional Retreat is a two-day, invite-only event that convenes approximately 75 senior institutional investors, including chief investment officers and senior investment staff for high-level discussion and networking. The retreat features curated content, peer discussions, award ceremonies, and opportunities to engage directly with leading asset owners and allocators. Its agenda is informed by extensive outreach and feedback across a diverse set of institutional investors, including public and corporate pension plans, endowments, foundations, insurance companies, healthcare plans, and investment consultants.
Website	Institutional Summer Retreat Park City July 13-15, 2026
Contact	sales@marketsgroup.org
Fees	Not available. Contact organizer for more information.
Modern Investment Theory & Practice for Retirement Systems 07/19-22/2026 Berkeley, CA	The Modern Investment Theory & Practice for Retirement Systems course, presented by UC Berkeley's Haas School of Business, is an in-depth educational program designed to equip retirement system professionals with practical knowledge of contemporary investment models and strategies. Tailored for SACRS members, the course focuses on applying these concepts directly to plan administration, helping participants strengthen their investment decision-making and overall expertise. Attendees who complete the program earn a certificate from UC Berkeley, reinforcing its emphasis on both professional development and applied learning.
Website	SACRS UC Berkeley Program 2026 SACRS
Contact	sacrs@sacrs.org
Fees	\$3,000 - \$4,500
Annual Conference – National Association of State Retirement Administrators (NASRA)	Exclusively for members, the conference offers a comprehensive agenda including general sessions, panel discussions, roundtables, and peer networking, all focused on public

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08/08-12/2026 Boston, MA	retirement system governance and operations. Attendees gain insights from nationally recognized experts on topics such as investment management, governance, economic trends, workforce issues, technology, cybersecurity, and legislative developments. The event also features interactive workshops for senior staff and CEOs, plus opportunities to explore innovative solutions from associate members and partners, making it a key forum for enhancing the management, sustainability, and security of U.S. public retirement systems. <i>Members Only</i>
Website	NASRA
Contact	mary@nasra.org
Fees	Not available. Contact organizer for more information.
Public Pension Funding Forum — National Conference on Public Employee Retirement Systems (NCPERS) 08/17-19/2026 Chicago, IL	The Public Pension Funding Forum brings together trustees, administrators, policymakers, and experts to deepen understanding of trends and developments in public pension funding. Featuring presentations and debates by leading economists, including Nobel laureates, the event delivers objective analysis, research, and practical case studies on funding adequacy and reform initiatives. Attendees gain insights into the fiscal, political, and economic forces shaping pension systems, learn to distinguish rhetoric from fact, and explore solutions for sustainable funding. The Forum is designed for a wide range of stakeholders—including pension fund officials, legislators, the investment community, and researchers—and focuses on advancing educational programs and research to support the long-term health of public pension plans.
Website	About NCPERS Public Pension Funding Forum
Contact	info@ncpers.org
Fees	Not available. Contact organizer for more information.
Annual Retirement Plan Advisor Summit - Institutional Investor 09/29-30/2026 Santa Monica, CA	The Retirement Plan Advisor Institute (RPAI) is an invitation-only community that brings together leading retirement plan advisors, asset managers, and service providers for focused, peer-driven dialogue on the defined contribution market. Its meetings are designed to facilitate candid, collaborative discussions in a confidential setting, with agendas shaped by experienced practitioners and centered on the most pressing challenges facing retirement plans. Overall, the program emphasizes practical insights and actionable takeaways, helping participants

2026 Event Title — Organizer, Date, and Location	Overview and Audience
	align on industry priorities and enhance decision-making in a rapidly evolving environment.
Website	5th Annual Retirement Plan Advisor Summit
Contact	cynthia.huynh@institutionalinvestor.com
Fees	Not available. Contact organizer for more information.
Fall 2026 Conference – Council of Institutional Investors 09/30-10/02/2026 Boston, MA	Registration has not opened. As such there is not a program or agenda for this year’s conference. A link to last years program is below for a comparable reference. CII 2025 Fall Conference.pdf
Website	CII Fall 2026 Conference: Boston, MA
Contact	michael@cii.org
Fees	Registration not yet open.
Annual Conference – National Council on Teacher Retirement (NCTR) 10/03-06/2026 Coeur D’Alene, ID	Website is password protected for members only.
Website	Annual Conference – NCTR
Contact	(916) 769-5909
Fees	Must log in as member to view.
Consultant Roundtable – Institutional Investor 10/07-08/2026 Chicago, IL	This conference is designed to help institutional investors navigate a rapidly evolving investment landscape shaped by higher interest rates, technological innovation, and shifting geopolitical dynamics. Through a series of discussions and presentations, it explores how these forces are redefining asset allocation, market structure, and global economic relationships, while equipping participants with the insights needed to interpret change, adapt strategies, and respond effectively in an increasingly complex environment.
Website	Consultants & Institutional Investors Roundtable
Contact	bdoshi@iiforums.com
Fees	Not available. Contact organizer for more information.
Fiduciary in Focus Workshop - National Conference on Public Employee Retirement Systems (NCPERS)	The NCPERS Fiduciary in Focus Workshop is an advanced, small-group program designed to help trustees and pension staff deepen their understanding of key fiduciary responsibilities and practical decision-making. Through hands-on exercises, interactive discussions, and expert-led instruction, the workshop



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10/24-25/2026 Nashville, TN	focuses on timely, high-impact topics, equipping participants with the tools and insights needed to address today’s most pressing challenges in pension governance. Held each fall ahead of the broader NCPERS conference, it provides an immersive learning environment for more focused skill development and peer engagement.
Website	Fiduciary in Focus Workshop - National Conference on Public Employee Retirement Systems
Contact	registration@ncpers.org
Fees	\$930. Increase to \$1,130 on 10/11.
Fall Conference – State Association of County Retirement Systems (SACRS) 11/10-13/2026 Rancho Mirage, CA	The SACRS Annual Fall Conference 2026, taking place November 10–13 in Rancho Mirage, CA, is a multi-day event designed to provide public pension stakeholders with practical insights into today’s complex investment and governance environment. The program focuses on equipping attendees with actionable perspectives on fiduciary responsibility, current financial market conditions, geopolitical influences, and modern investment management strategies, helping participants stay informed and make more effective decisions in an evolving landscape.
Website	SACRS > Events > Fall Conference
Contact	sacrs@sacrs.org
Fees	Registration not yet open.



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2026	Location	2026 Event and Organizer
07/13/2026	Park City, UT	Annual Institutional Summer Retreat – Markets Group
07/19/2026	Berkeley, CA	Modern Investment Theory & Practice for Retirement Systems - State Association of County Retirement Systems (SACRS)
08/08/2026	Boston, MA	Annual Conference – National Association of State Retirement Administrators (NASRA)
08/17/2026	Chicago, IL	Public Pension Funding Forum – National Conference on Public Employee Retirement Systems (NCPERS)
09/29/2026	Santa Monica, CA	Annual Retirement Plan Advisor Summit – Institutional Investor
09/30/2026	Boston, MA	Fall 2026 Conference – Council of Institutional Investors
10/03/2026	Coeur D'Alene, ID	Annual Conference – National Council on Teacher Retirement
10/07/2026	Chicago, IL	Consultant Roundtable – Institutional Investor
10/24/2026	Nashville, TN	Fiduciary in Focus Workshop – National Conference on Public Employee Retirement Systems (NCPERS)
11/10/2026	Rancho Mirage, CA	Fall Conference – State Association of County Retirement Systems (SACRS)



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