



RETIREMENT BOARD CALENDAR SHEET
Retirement Board Meeting of May 8, 2019

To: Retirement Board
From: Jay Huish *JH*
Executive Director
Date: May 8, 2019

Agenda Item: Executive Director's Report

Background:

Jay Huish, Executive Director, will report on the following items:

Administrative Update:

- Oral Arguments on May 1, 2019 at Court of Appeals in *City and County of San Francisco v. Retirement Board* (Payment of Supplemental COLAs to pre-1996 retirees)

Recommendation: This is a discussion item only.

Attachments for Informational Purposes:

- Retirement Board Forward Calendar for June 2019 to May 2020
- Request for Proposal in Progress Blackout Period
- *Public Retirement Conferences and Training Programs for SFERS Trustees* – Nossaman LLP
- *The Cortex Report* – Conferences and Training Events listing



SFERS
San Francisco Employees' Retirement System

City and County of San Francisco
Employees' Retirement System
Office of the Executive Director

To: Retirement Board
From: Jay Huish *JH*
Executive Director
Date: May 8, 2019
Subject: Retirement Board Forward Calendar for June 2019 to May 2020

June 12, 2019 Retirement Board Meeting

1:00 PM

Item
Administration:
Election of Board President
Election of Board Vice President
Review and Approval of 2019-2024 SFERS Strategic Plan
Executive Director's Report
Investments:
Private Equity Portfolio Update
Real Assets Portfolio Update
Report on Investment Performance of the Retirement Fund for the Quarter Ended March 31, 2019
Report on Managers Under Review
CIO Report

July 10, 2019 Retirement Board Meeting

1:00 PM

Item
Administration:
Economic Assumptions Review for July 1, 2019 Actuarial Valuation
Approval of President's Committee Assignments
Executive Director's Report
Investments:
Private Equity Portfolio Update
Real Assets Portfolio Update
CIO Report

July 17, 2019 Investment Committee Meeting

1:00 PM

Item
TBD

August 14, 2019 Retirement Board Meeting**1:00 PM**

Item
Administration:
Travel Expense Report for the Quarter Ended June 30, 2019
Executive Director's Report
Deferred Compensation:
SFDCP Manager Report
Investments:
Private Equity Portfolio Update
Real Assets Portfolio Update
CIO Report

September 11, 2019 Retirement Board Meeting**1:00 PM**

Item
Administration:
Review and Acceptance of July 1, 2019 Supplemental COLA Analysis
Executive Director's Report
Investments:
Report on Investment Performance of the Retirement Fund for the Quarter Ended June 30, 2019
Report on Managers Under Review
Annual Report and Recommendation on Tobacco Divestment
Annual Report and Recommendation on Targeted Divestment in Sudan
Annual Report and Recommendation on Firearms Divestment
Annual Report and Recommendation on Thermal Coal Divestment
CIO Report

October 9, 2019 Retirement Board Meeting**1:00 PM**

Item
Administration:
Update on 2019-2024 SFERS Strategic Plan
Executive Director's Report
Investments:
Annual Update on Fossil Fuel Investments Engagement and Divestment
Review and Approval of Updated Investment Policy Statement
CIO Report

October 16, 2019 Investment Committee Meeting**1:00 PM**

Item
TBD

November 13, 2019 Retirement Board Meeting**1:00 PM**

Item
Administration:
Travel Expense Report for the Quarter Ended September 30, 2019
2018 Economic Assumptions and Proposed Update to Funding Policy
Presentation of June 30, 2019 GASB 67/68 Report
Executive Director's Report
Deferred Compensation:
Review of SFDCP Investment Performance for First Half of 2019
SFDCP Manager Report
Investments:
CIO Report

December 11, 2019 Retirement Board Meeting**1:00 PM**

Item
Administration:
Schedule of 2020 Retirement Board Meetings
2020 Forward Calendar of Retirement Board Meetings
Executive Director's Report
Investments:
Report on Investment Performance of the Retirement Fund for the Quarter Ended September 30, 2019
Report on Managers Under Review
CIO Report

January 8, 2020 Retirement Board Meeting**1:00 PM**

Item
Administration:
Board Fiduciary Training
GASB Report
Executive Director's Report
Investments:
CIO Report

February 12, 2020 Retirement Board Meeting**1:00 PM**

Item
Administration:
Travel Expense Report for the Quarter Ended December 31, 2019
Review and Approval of July 1, 2020 Basic Cost of Living Adjustment
Determination and Approval of Credited Interest Rate for Fiscal Year 2020-21
Review and Adoption of July 1, 2019 Actuarial Valuation Report

Adoption of Employer Contribution Rates for Fiscal Year 2020-21
GASB Report
Review and Approval of FY2020-21 Department Budget
Update on 2019-2024 SFERS Strategic Plan
Executive Director's Report
Deferred Compensation:
SFDCP Manager Report
Investments:
Proxy Voting Report for Calendar Year 2019
Review and Approval of Proxy Voting Policies for Calendar Year 2020
CIO Report

March 11, 2020 Retirement Board Meeting

1:00 PM

Item
Administration:
Presentation of SFERS Audited Financial Statement and Required Communications for Years Ended June 30, 2019 and June 30, 2018
Review and Approval of 2019 SFERS Annual Report
Executive Director's Report
Deferred Compensation:
SFDCP Manager Report
Investments:
Report on Investment Performance of the Retirement Fund for the Quarter Ended December 31, 2019
Report on Managers Under Review
CIO Report

April 08, 2020 Retirement Board Meeting

1:00 PM

Item
Administration:
Review of 2019-2024 SFERS Strategic Plan
Review and Approval of 2019 SFERS Annual Report
Executive Director's Report
Investments:
CIO Report

April 15, 2020 Investment Committee Meeting

1:00 PM

Item
TBD

Item
Administration:
Travel Expense Report for the Quarter Ended March 31, 2020
Executive Director's Report
Deferred Compensation:
SFDCP Manager Report
Investments:
CIO Report



SFERS
San Francisco Employees' Retirement System

**City and County of San Francisco
Employees' Retirement System**

**RETIREMENT BOARD CALENDAR SHEET
Retirement Board Meeting of May 8, 2019**

To: Retirement Board
From: Jay Huish *AJH*
Executive Director
Date: May 8, 2019
RE: Request for Proposal in Progress Blackout Period List

The following Requests for Proposals/Qualifications are currently open and subject to the Board's Blackout Policy:

- SFERS Executive Recruitment and Search Services RFQ

PUBLIC RETIREMENT CONFERENCES AND TRAINING PROGRAMS FOR SFERS TRUSTEES

May to December 2019

Date	Sponsor	Program	Location
May 19-22, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference <i>NCPERS is a membership organization providing education and networking opportunities to trustees and executive staff of public pension systems through the United States.</i>	Austin, TX
June 3-7, 2019	The Wharton School, University of Pennsylvania (Wharton)	Investment Strategies and Portfolio Management <i>This program is part of Wharton's Executive Education series that it states is taught by its "renowned finance faculty with practitioner experience and expertise. The program provides a solid understanding of today's investment landscape and tools and theories for developing and measuring the performance of portfolios. It then looks closely at specific asset classes."</i>	Philadelphia, PA
June 7, 2019	California Association of Public Retirement Systems (CALAPRS)	Trustees' Roundtable <i>This educational program is designed for trustees of public retirement systems in California. The agenda is typically circulated one or two weeks before the roundtable.</i>	Burbank, CA
July 22-24, 2019	State Association of County Retirement Systems (SACRS)	Public Pension Investment Management Program <i>This educational program is designed for trustees and investment staff of public retirement systems in California.</i>	UC Berkeley, Berkeley, CA
August 26-29, 2019	CALAPRS	Principles of Pension Management for Trustees <i>This intensive multi-day workshop provides a primer on the fiduciary, ethics, administrative and governance aspects of being a public retirement system trustee in California.</i>	Malibu, CA
September 5, 2019	Nossaman LLP	Annual Public Pension Fiduciaries' Forum <i>This invitation-only annual educational event for trustees, executive staff and in-house counsel of public pension systems tackles the most challenging fiduciary topics for public pension fund trustees of the moment. The Forum provides an interactive and engaging opportunity to discuss those issues among peers, led by national experts on the topics that are covered.</i>	San Francisco, CA

September 11-12, 2019	NCPERS	Public Pension Funding Forum <i>See description of NCPERS Annual conference above.</i>	New York, NY
September 16-18, 2019	CII	CII Fall Conference <i>See description of CII Spring Conference above.</i>	Minneapolis, MN
October 25, 2019	CALAPRS	Trustees' Roundtable <i>This educational program is designed for trustees of public retirement systems in California. The agenda is typically circulated one or two weeks before the roundtable.</i>	Oakland CA
November 12-15, 2019	SACRS	SACRS Fall Conference <i>See description of SACRS Spring Conference above.</i>	Monterey, CA



The Cortex Report

Customized for the

San Francisco Employees' Retirement System

May 2019

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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, target audience, 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.

In preparing your report, we have selected education events based on the following parameters, as determined in consultation with your staff:

- **Event target audience:** All Institutional Funds, All Pension Funds, US Pension Funds, and US Public Sector Funds.
- **Event location:** All locations (no exclusions).
- **Event sponsors:** Industry associations, professional associations, academic and research institutions, trade publications, public institutions, and California associations.¹ Private organizers **have been** excluded.
- **Event price:** No limits.
- **Topics:** All topic areas have been included.

Please also note the terms and conditions for use of this report at the end of the report.

¹ The Cortex Report does not at this time include education events sponsored by investment consultants or investment managers.

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May 02, 2019	Pension Research Council, The Wharton School	Remaking Retirement? Debt in an Aging Economy	Philadelphia	1
May 06, 2019	IMD Business School	High Performance Boards	Lausanne	1
May 06, 2019	BCA Research - Approved by the CFA Institute	Principles of Global Macro	New York	2
May 06, 2019	The Wharton School, University of Pennsylvania	Venture Capital	Philadelphia	2
May 07, 2019	State Association of County Retirement Systems (SACRS)	Spring Conference	Lake Tahoe	3
May 07, 2019	Mercer and Schulich School of Business, York University	The School of Pension Investment Management (SPIM)	Toronto	3 <i>New</i>
May 12, 2019	CFA Institute	Annual Conference	London	4
May 12, 2019	Public Retirement Information Systems Management (PRISM)	Annual Conference	Indianapolis	4
May 12, 2019	Harvard Kennedy School, Harvard University	Infrastructure in a Market Economy: Public-Private Partnerships	Cambridge	5
May 13, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Toronto	5
May 13, 2019	Institute of Corporate Directors and Rotman School of Management (UofT)	NFP Program	Vancouver	6
May 13, 2019	BCA Research - Approved by the CFA Institute	Global Asset Allocation	Toronto	6
May 14, 2019	Journal of Investment Management - Approved by the CFA Institute	Spring Conference	New York	7
May 14, 2019	Institutional Investor	Redefining Fixed Income Forum	Chicago	7
May 14, 2019	Pensions & Investments	ESG Investing	Chicago	8
May 15, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Ottawa	8
May 16, 2019	Pensions & Investments	ESG Investing	San Francisco	9
May 16, 2019	Plan Sponsor	Chief Investment Officer Summit	New York	9
May 18, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Trustee Education Seminar	Austin	10
May 18, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	Austin	10
May 18, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Advanced Trustee Studies	Austin	11 <i>New</i>
May 19, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Annual Conference and Exhibition	Austin	11
May 21, 2019	Pensions & Investments	ESG Investing	Boston	12
May 21, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Vancouver	12
May 23, 2019	Institute of Corporate Directors	Human Resources & Compensation Committee Effectiveness	Calgary	13

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May 23, 2019	Pensions & Investments	ESG Investing	New York	13
May 28, 2019	Institute of Corporate Directors and Rotman School of Management (U of T)	NFP Program	Toronto	14
Jun 02, 2019	International Centre for Pension Management (ICPM)	Discussion Forum	Vancouver	14
Jun 03, 2019	Said Business School, Oxford University - Approved by the CFA Institute	Private Equity Program	Oxford	15
Jun 03, 2019	BCA Research - Approved by the CFA Institute	Principles of Global Macro	London	15
Jun 04, 2019	Columbia Business School	Value Investing	New York	16
Jun 05, 2019	Plan Sponsor	Plan Sponsor National Conference	Washington	16
Jun 05, 2019	International Centre for Pension Management (ICPM) - jointly with NEST & The Aspen	Defined Contribution Program	Vancouver	17 <i>New</i>
Jun 06, 2019	The Conference Board	Leadership Development Conference	San Diego	17
Jun 06, 2019	London School of Economics, Paul Woolley Centre - In collaboration with the Bank for	Annual Conference	London	18 <i>New</i>
Jun 07, 2019	California Association of Public Retirement Systems (CALAPRS)	Trustees' Roundtable	Glendale	18 <i>New</i>
Jun 10, 2019	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia	19
Jun 10, 2019	Said Business School, Oxford University	Oxford Chicago Valuation Program	Oxford	19
Jun 10, 2019	Institutional Investor	Defined Contribution Roundtable	Apella	20
Jun 10, 2019	INSEAD	Leading from the Chair	Fontainebleau	20
Jun 10, 2019	London Business School	Project and Infrastructure Finance	London	21
Jun 10, 2019	BCA Research - Approved by the CFA Institute	Geopolitics and Investing	Washington	21
Jun 11, 2019	Columbia Business School	Value Investing (Online): Making Intelligent Investment Decisions	Online	22
Jun 11, 2019	Global Risk Institute & Rotman School of Management, University of Toronto	Board Risk Oversight and Insight Program	Toronto	22
Jun 12, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Chief Officers Summit	Chicago	23
Jun 17, 2019	IMD Business School	High Performance Boards	Lausanne	23
Jun 21, 2019	Institute of Corporate Directors and Rotman School of Management (U of T)	Board Oversight of Strategy	Halifax	24
Jun 23, 2019	Harvard Business School and CFA Institute	Investment Management Workshop	Cambridge	24
Jul 10, 2019	Pacific Pension Institute	Summer Roundtable	Chicago	25
Jul 16, 2019	Yale School of Management and EDHEC-Risk Institute - Approved by the CFA Institute	Multi Asset Investment Products and Solutions Seminar	New Haven	25

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Jul 16, 2019	International Corporate Governance Network (ICGN)	Annual Conference	Tokyo	26
Jul 21, 2019	National Council on Teacher Retirement (NCTR)	Trustee Workshop	Berkeley	26
Jul 21, 2019	Harvard Business School, Harvard University	Compensation Committees: New Challenges, New Solutions	Cambridge	27
Jul 22, 2019	Wharton School, University of Pennsylvania - for the IFEBP	International and Emerging Market Investing	San Francisco	27
Jul 22, 2019	SACRS & Haas School of Business, UC Berkeley	Public Pension Investment Management Program	Berkeley	28
Jul 22, 2019	CFA Institute - Hosted by CFA Society Chicago	CFA Institute Seminar for Global Investors	Chicago	28
Jul 24, 2019	Harvard Business School, Harvard University	Audit Committees in a New Era of Governance	Cambridge	29
Aug 03, 2019	National Association of State Retirement Administrators (NASRA)	Annual Conference	Williamsburg	29
Aug 26, 2019	CALAPRS - In association with Pepperdine University	Principles of Pension Management for Trustees	Malibu	30
Sep 04, 2019	Harvard Business School, Harvard University	Governing for Nonprofit Excellence: Critical Issues for Board Leadership	Cambridge	30 <i>New</i>
Sep 08, 2019	National Association of Government DC Administrators (NAGDCA)	Annual Conference	New Orleans	31
Sep 08, 2019	Journal of Investment Management - Approved by the CFA Institute	Fall Conference	Cambridge	31
Sep 09, 2019	Principles for Responsible Investment (PRI) - in collaboration with the University of Hamburg	PRI Academic Network Conference	Paris	32 <i>New</i>
Sep 10, 2019	Principles for Responsible Investment (PRI)	PRI in Person	Paris	32
Sep 11, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Public Pension Funding Forum	New York	33
Sep 16, 2019	Council of Institutional Investors	Fall Conference	Minneapolis	33
Sep 17, 2019	London Business School	Masterclass in Private Equity	London	34
Sep 17, 2019	Institutional Investor	East Coast Private Markets Summit	Boston	34 <i>New</i>
Sep 19, 2019	Institutional Investor	Defined Contribution Institute	Half Moon Bay	35 <i>New</i>
Sep 19, 2019	Institutional Investor	Defined Contribution Institute	Half Moon Bay	35
Sep 19, 2019	Amsterdam Institute of Finance – Approved by the CFA Institute	Behavioral Risk Management	Amsterdam	36
Sep 19, 2019	Institutional Investor	Making an Impact with ESG Investing Summit	Amsterdam	36 <i>New</i>
Sep 23, 2019	Amsterdam Institute of Finance – Approved by the CFA Institute	Private Equity	Amsterdam	37
Sep 24, 2019	Institutional Investor	Systematic Investment Symposium	London	37
Sep 24, 2019	Financial Times (FT)	Investment Management Summit	London	38

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Sep 24, 2019	Institutional Investor	Future of Index Investing Symposium	London	38	<i>New</i>
Sep 24, 2019	Pensions & Investments	Emerging Markets	Chicago	39	
Sep 26, 2019	BCA Research - Approved by the CFA Institute	Investment Conference	New York	39	<i>New</i>
Sep 26, 2019	Pensions & Investments	Emerging Markets	New York	40	
Sep 30, 2019	IMD Business School	High Performance Boards	Lausanne	40	
Oct 07, 2019	London Business School	Strategic Investment Management	London	41	
Oct 09, 2019	IMD Business School	Team Dynamics for Boards	Lausanne	41	
Oct 13, 2019	National Council on Teacher Retirement (NCTR)	Annual Conference	Nashville	42	
Oct 15, 2019	International Corporate Governance Network (ICGN) - Hosted by Eumedion	ICGN Miami Conference	Miami	42	<i>New</i>
Oct 15, 2019	Pensions & Investments	Managing Pension Risk & Liabilities	Austin	43	
Oct 16, 2019	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Washington	43	
Oct 17, 2019	The Conference Board	Talent Acquisition Conference	New York	44	
Oct 17, 2019	CFA Institute - Hosted with the CFA Society Boston	Fixed Income Management	Boston	44	
Oct 19, 2019	National Pension Education Association (NPEA)	Annual Conference	Naples	45	
Oct 20, 2019	Public Pension Financial Forum (P2F2)	Annual Conference	Salt Lake City	45	
Oct 20, 2019	American Society of Pension Professionals & Actuaries (ASPPA)	Annual Conference	National Harbor	46	<i>New</i>
Oct 21, 2019	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia	46	
Oct 22, 2019	Pensions & Investments	World Pension Summit	The Hague	47	
Oct 22, 2019	Mercer	Global Investment Forum	Boston	47	
Oct 23, 2019	Columbia Business School	Real Estate as an Asset and Business	New York	48	<i>New</i>
Oct 24, 2019	The Conference Board	Executive Compensation Conference	New York	48	
Oct 25, 2019	California Association of Public Retirement Systems (CALAPRS)	Trustees' Roundtable	Oakland	49	<i>New</i>
Oct 26, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Accredited Fiduciary (NAF) Program	New Orleans	49	
Oct 27, 2019	National Conference on Public Employee Retirement Systems (NCPERS)	Public Safety Conference	New Orleans	50	
Oct 27, 2019	International Centre for Pension Management (ICPM)	Discussion Forum	Sydney	50	

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Oct 28, 2019	Amsterdam Institute of Finance – Approved by the CFA Institute	Behavioral Finance	Amsterdam	51
Nov 03, 2019	Pensions & Investments	West Coast Defined Contribution Conference	San Diego	51
Nov 03, 2019	Pacific Pension Institute	Executive Seminar	Hangzhou	52
Nov 04, 2019	The Wharton School, University of Pennsylvania	Private Equity: Investing and Creating Value	Philadelphia	52
Nov 05, 2019	The Conference Board	Succession Management Conference	New York	53
Nov 06, 2019	Pacific Pension Institute	Asia Pacific Roundtable	Shanghai	53
Nov 07, 2019	Institutional Investor	Defined Contribution Institute	Boston	54
Nov 11, 2019	Amsterdam Institute of Finance – Approved by the CFA Institute	Fixed Income Investment	Amsterdam	54
Nov 12, 2019	Pensions & Investments	Multi-Asset Investing	Chicago	55
Nov 12, 2019	State Association of County Retirement Systems (SACRS)	Fall Conference	Monterey	55
Nov 13, 2019	Harvard Kennedy School	Investment Decisions and Behavioral Finance	Cambridge	56
Nov 14, 2019	Pensions & Investments	Multi-Asset Investing	New York	56
Nov 14, 2019	CFA Institute - Hosted with the CFA Society New York	Equity Research and Valuation	New York	57
Nov 20, 2019	Institutional Investor	Global East Government Funds Roundtable	Singapore	57 <i>New</i>
Nov 25, 2019	IMD Business School	High Performance Boards	Lausanne	58
Nov 25, 2019	Amsterdam Institute of Finance – Approved by the CFA Institute	Understanding Global Macroeconomics	Amsterdam	58
Nov 26, 2019	International Corporate Governance Network (ICGN)	Global Stewardship Forum	London	59 <i>New</i>
Dec 02, 2019	INSEAD - Approved by the CFA Institute	Advanced Asset Management	Fontainebleau	59
Dec 02, 2019	London Business School	Project and Infrastructure Finance	London	60
Dec 03, 2019	Columbia Business School	Value Investing	New York	60
Dec 04, 2019	Responsible Investor	RI Americas	New York	61 <i>New</i>
Dec 05, 2019	Financial Times (FT)	Investing for Good USA	New York	61 <i>New</i>
Dec 08, 2019	The Wharton School, University of Pennsylvania	Venture Capital	San Francisco	62
Dec 11, 2019	INSEAD	Leading from the Chair	Fontainebleau	62 <i>New</i>
Jan 26, 2020	National Conference on Public Employee Retirement Systems (NCPERS)	Legislative Conference	Washington	63

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Mar 04, 2020	Pension Real Estate Association (PREA)	PREA Spring Conference	Beverly Hills	63	<i>New</i>
Mar 04, 2020	Harvard Business School, Harvard University	Private Equity and Venture Capital	Cambridge	64	<i>New</i>
Mar 16, 2020	Saïd Business School, Oxford University	Impact Investing Program	Oxford	64	<i>New</i>
Mar 23, 2020	Saïd Business School, Oxford University	Real Estate Program	Oxford	65	<i>New</i>

Event Listings

Conference: Remaking Retirement? Debt in an Aging Economy

Start Date: May 02, 2019

Organizer: Pension Research Council, The Wharton School

End Date: May 03, 2019

Location: Philadelphia, Pennsylvania

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

Topic Area: Pension Plan Policy

Attendance: Members Only

This symposium explores changing patterns of debt as the world ages and what these patterns will imply for retirement security. Implications for plan sponsors, benefits specialists, actuaries, academics, regulators, and plan participants will be drawn out in terms of saving, investment, consumption, and housing expenditures.

The symposium is for members only and by invitation. Please visit the website and log in for more information.

Fees

Not available. Please contact conference organizer.

Contact

Phone: 215.898.7620
Fax: 215.573.3418

Email

prc@wharton.upenn.edu

Link: <https://pensionresearchcouncil.wharton.upenn.edu/conferences/>

Course: High Performance Boards

Start Date: May 06, 2019

Organizer: IMD Business School

End Date: May 09, 2019

Location: Lausanne, Switzerland

Alternative Date(s) & Location(s) June 17-20, 2019, Lausanne
Sep 30-Oct 3, 2019, Lausanne
November 25-28, 2019, Lausanne

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is for supervisory board members and chairpersons. It is designed to prepare your board to face the challenges of a complex world.

Specifically the program will help you:

- Identify what makes best practice boards
- Drive positive board culture
- Evaluate and mitigate risk and maximize opportunities through strategic board involvement
- Ensure successful succession plans
- Learn how to manage a board in crisis

See the website for more information about the program.

Fees

CHF 11,500

Contact

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

Email

N/A

Link: <http://www.imd.org/hpb/board-governance/>

Course: Principles of Global Macro

Start Date: May 06, 2019

Organizer: BCA Research - Approved by the CFA Institute

End Date: May 07, 2019

Location: New York, New York

Alternative Date(s) & Location(s) June 3-4, 2019, London, UK

Topic Area: Investments

Attendance: Open To All

BCA has been an independent provider of global investment research for over 65 years. Participants of its courses learn techniques that will enable them to interpret data and important economic developments from the perspective of an investment professional. This seminar will help you better assess macro risks and opportunities. You will:

- Focus on the analytical methods and investment strategies developed for macroeconomics, sector analysis and quantitative modelling.
- Learn techniques that will enable you to interpret data and important economic developments
- Explore how movements in certain assets can influence returns in other financial assets.
- Look at important and interesting questions, such as why a strong currency implies lower bond yields, and how lower interest rates can boost equity multiples.
- Gain accessible methods that are critical to understanding how markets work.

See the website for more information about the program.

Fees

\$3,795

Contact

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

Email

academy@bcaresearch.com

Link: <https://interactive.bcaresearch.com/academy/principles-of-macroeconomics-719PC-4670ZC.html?>

Course: Venture Capital

Start Date: May 06, 2019

Organizer: The Wharton School, University of Pennsylvania

End Date: May 10, 2019

Location: Philadelphia, Pennsylvania

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

Topic Area: Investments

Attendance: Open To All

This program will discuss how VC funds are organized, how investments are selected, and how due diligence is conducted. It will examine case studies that detail a transaction from beginning to end. Participants will see how a deal is structured, learn more about the differing incentives of a VC fund and entrepreneurs, and gain a deeper understanding of venture investing. Session topics may include:

- Limited Partner/General Partner Negotiation and Contracting
- The VC Business Model: Sourcing, Screening, and Selection
- Venture Capital Valuation Method
- Term Sheets: The Venture Capitalist's and Entrepreneur's perspectives
- Deal Sourcing
- Managing Innovative Processes
- Later-Round Financing
- Preferred Stock Valuation
- Exit Strategies

See the website for more information about the program.

Fees

\$10,950

Fee includes lodging and meals. Session is full. Contact program organizer for waitlist.

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Conference: Spring Conference

Start Date: May 07, 2019

Organizer: State Association of County Retirement Systems (SACRS)

End Date: May 10, 2019

Location: Lake Tahoe, California

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

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

\$120 - system member and other non-profit member
\$2,670 - non-member

Contact

Phone: 916-441-1850
Fax: 916-441-6178

Email

sacrs@sacrs.org

Link: <https://sacrs.org/events/spring-conference/>

Course: The School of Pension Investment Management (SPIM)

Start Date: May 07, 2019

Organizer: Mercer and Schulich School of Business, York University

End Date: May 08, 2019

Location: Toronto, Ontario, Canada

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

Topic Area: General

Attendance: Open To All

This is an intensive two-day seminar designed to provide pension plan fiduciaries with the knowledge to improve the overall governance and management of their defined benefit pension fund. The core areas of study are the following:

- Fiduciary responsibility and prudent governance
- Principles of pension finance and investment
- Asset mix policy and risk management
- Manager structure, currency management, active and passive management
- Investment monitoring and oversight

The curriculum will also feature these additional topics:

- Alternative investments
- Responsible investing programs
- Group decision-making

See the website for more information about the program.

Fees

CAD \$ 2,700 + HST

Contact

Mohani Balraj
Phone: +1 416 868-2985

Email

mohani.balraj@mercerc.com

Link: <https://www.mercer.ca/en/events/school-of-pension-investment-management.html>

Conference: Annual Conference

Start Date: May 12, 2019

Organizer: CFA Institute

End Date: May 15, 2019

Location: London, UK

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

Topic Area: Investments

Attendance: Open To All

The theme of the conference is Disruption: The New Reality in Investment Management. Disruption is everywhere, affecting every aspect of our lives. From technological and business innovation to globalisation and demographic shifts, these forces are constantly evolving and accelerating at a significant pace. You learn how disruption is affecting the global investment profession, and how to harness its opportunities and approach its challenges

The conference will feature keynotes with noted economists, best-selling authors, leading researchers and successful practitioners, as well as dedicated educational tracks on FinTech, Sustainable Investing, Private Wealth Management, Investing in Emerging Markets, Career Management and more.

See the website for more information about the conference.

Fees

£1300 - non-members
£1050 - CFA members

Contact

Phone: (434) 951-5499
Toll-free: 1 (800) 247-8132
Fax: +1 (434) 951-5262

Email

program@cfainstitute.org

Link: <https://annual.cfainstitute.org/>

Conference: Annual Conference

Start Date: May 12, 2019

Organizer: Public Retirement Information Systems Management (PRISM)

End Date: May 15, 2019

Location: Indianapolis, Indiana

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

Topic Area: Operations

Attendance: Members Only

The purpose of the PRISM organization is to provide a forum for IT management of public retirement funds to collaborate and share their experiences with new technologies affecting the retirement and IT industries.

See the website for more information about the conference.

Fees

Not yet available.

Contact

Please go to the website to contact the conference organizer.

Email

N/A

Link: <https://prism-assoc.org/CustomPage/Index/29>

Course: Infrastructure in a Market Economy: Public-Private Partnerships

Start Date: May 12, 2019

Organizer: Harvard Kennedy School, Harvard University

End Date: May 24, 2019

Location: Cambridge, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

This course is designed to help senior decision-makers address critical questions about public-private partnerships in infrastructure. The program will show how collaboration between the two sectors can lead to successful outcomes. Bringing together senior-level officials from the public, corporate and nonprofit sectors, this intensive two-week program examines lessons learned and best practices from public-private infrastructure development projects around the world.

See the website for more information about the program.

Fees

\$12,500
Includes tuition, housing, materials and most meals.
Applications after March 12, 2019 if space remains.

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

Link: <https://www.hks.harvard.edu/educational-programs/executive-education/infrastructure-market-economy>

Course: Human Resources & Compensation Committee Effectiveness

Start Date: May 13, 2019

Organizer: Institute of Corporate Directors

End Date: May 13, 2019

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) May 15, 2019, Ottawa ON
May 21, 2019, Vancouver BC
May 23, 2019, Calgary AB

Topic Area: Human Resources

Attendance: Open To All

This course was created to help directors develop deeper insights into issues such as CEO succession planning, executive compensation and incentive plans, human capital development beyond the CEO, and dealing with increased scrutiny of executive compensation plans by activist shareholders and proxy advisors.

See the website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: April 15, 2019

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/Short-Courses/HR-Compensation-Committee-Effectiveness.aspx>

Course: NFP Program

Start Date: May 13, 2019

Organizer: Institute of Corporate Directors and Rotman School of Management

End Date: May 14, 2019

Location: Vancouver, British Columbia, Canada

Alternative Date(s) & Location(s) May 28-29, 2019, Toronto ON

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program focuses on key accountabilities and responsibilities of leaders of not-for-profit (NFP) organizations through extensive use of team-based learning to ensure participants learn from both faculty and their peers.

Attend this program and gain the following benefits:

- Understand your fiduciary duty
- Learn best practices in governance
- Build group decision-making skills
- Apply change management principles to elevate board effectiveness

See the website for more information about the program.

Fees

\$2,500 CAD + tax
Course full - accepting waitlist

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/NFP-Program.aspx>

Course: Global Asset Allocation

Start Date: May 13, 2019

Organizer: BCA Research - Approved by the CFA Institute

End Date: May 13, 2019

Location: Toronto, Ontario, Canada

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

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.

See the website for more information about the program.

Fees

\$2,500

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-4675OK.html?>

Conference: Spring Conference

Start Date: May 14, 2019

Organizer: Journal of Investment Management - Approved by the CFA Institute

End Date: May 15, 2019

Location: New York, New York

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

Topic Area: Investments

Attendance: Members Only

This conference is titled Retirement Investing / FinTech and Analytics: The State of the Art Part I. The latest quantitative and Artificial Intelligence (AI) techniques will be explored in Finance. This will highlight developments in such areas as Goal Investing, Robo Investing, and the potential of Big Data and Artificial Intelligence (AI) as a basis for cutting edge approaches to Retirement Investing. Both the academic and practitioner perspectives will be covered.

This event is co-sponsored with NYU Stern School of Business and BlackRock. See the website for more information about the conference.

Fees

\$3,000 - guest seat (based on availability)
\$5,000 - annual membership (includes Spring & Fall Conferences)

Contact

Phone: (925) 299-7800
Fax: (925) 299-7815

Email

customerservice@joim.com

Link: <https://www.joim.com/conference-series/>

Conference: Redefining Fixed Income Forum

Start Date: May 14, 2019

Organizer: Institutional Investor

End Date: May 15, 2019

Location: Chicago, Illinois

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

Topic Area: DC Plans

Attendance: By Invitation Only

This forum will explore the challenges facing institutional investors in an environment in which many agree it is the time to get defensive. Topics include:

- Which tail risk and currency strategies are being employed?
- Are emerging markets being unfairly tarred with the same brush?
- Is it time to move up the capital structure?
- What barbell strategies are being deployed?
- How are you handling your alternative credit sleeves?
- LDI/Liability matching programs: What new approaches are being considered?
- Performance-based fee structures: Under what circumstances can you demand them?
- Which innovative approaches to ETFs may work for you?
- Which multi-asset strategies are you considering?
- What are the implications of proposed fixed income market structure reform?

See the website for more information about the conference.

Fees

Not available. Limited to "qualified individuals". Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Redefining-Fixed-Income-Forum>

Conference: ESG Investing

Organizer: Pensions & Investments

Location: Chicago, Illinois

Start Date: May 14, 2019

End Date: May 14, 2019

Alternative Date(s) & Location(s) May 16, 2019, San Francisco CA
May 21, 2019, Boston MA
May 23, 2019, New York NY

Topic Area: DC Plans

Attendance: Open To All

This conference attracts top institutional investors who are noted for being forward-thinking and dedicated to managing sustainable long-term investments.

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

pi-registration@pionline.com

Link: <https://conferences.pionline.com/conference/esg-breakfast/2019>

Course: Human Resources & Compensation Committee Effectiveness

Organizer: Institute of Corporate Directors

Location: Ottawa, Ontario, Canada

Start Date: May 15, 2019

End Date: May 15, 2019

Alternative Date(s) & Location(s) May 13, 2019, Toronto ON
May 21, 2019, Vancouver BC
May 23, 2019, Calgary AB

Topic Area: Human Resources

Attendance: Open To All

This course was created to help directors develop deeper insights into issues such as CEO succession planning, executive compensation and incentive plans, human capital development beyond the CEO, and dealing with increased scrutiny of executive compensation plans by activist shareholders and proxy advisors.

See the website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: April 17, 2019

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/Short-Courses/HR-Compensation-Committee-Effectiveness.aspx>

Conference: ESG Investing
Organizer: Pensions & Investments
Location: San Francisco, California

Start Date: May 16, 2019
End Date: May 16, 2019
Alternative Date(s) & Location(s) May 14, 2019, Chicago IL
 May 21, 2019, Boston MA
 May 23, 2019, New York NY

Topic Area: DC Plans

Attendance: Open To All

This conference attracts top institutional investors who are noted for being forward-thinking and dedicated to managing sustainable long-term investments.

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

pi-registration@pionline.com

Link: <https://conferences.pionline.com/conference/esg-breakfast/2019>

Conference: Chief Investment Officer Summit
Organizer: Plan Sponsor
Location: New York, New York

Start Date: May 16, 2019
End Date: May 17, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: General

Attendance: Open To All

This summit will bring together CIOs and senior investment consultants to discuss a range of issues from fund leverage to ESG, from private equity to artificial intelligence. They'll vet ideas on balancing governance models, team restructuring, benchmarks, and board alignment. The summit will feature a special session exclusively for CIOs, on a topic relevant to and decided by CIO summit registrants.

The summit is designed to address the investment, strategic and operational challenges facing asset owners with a minimum AUM of \$1B+ (pension funds, sovereign wealth funds, endowments & foundations, healthcare and insurance funds, large family offices).

See the website for more information about the conference.

Fees

No charge for plan sponsors.

Contact

Carol Popkins
 Phone: 203-461-0985

Email

carol.popkins@strategic-i.com

Link: <https://www.ai-cio.com/events/2019-chief-investment-officer-summit/>

Conference: Trustee Education Seminar

Start Date: May 18, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 19, 2019

Location: Austin, Texas

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

Topic Area: Board Governance & Leadership

Attendance: Members Only

This is a pre-conference program held in conjunction with the Annual Conference and Exhibition. It is intended for new and novice trustees who are seeking a better understanding of their role and responsibilities as trustee of their pension fund. It also serves as a refresher for experienced trustees interested in staying up-to-date.

The two-day program is designed with a clear focus on the educational needs of trustees who are relatively new to a pension plan board. The focus is on investing principles, board policies, and fundamental concepts that every trustee should know.

See the website for more information about the program.

Fees

\$665
\$205 discount for registration by April 15, 2019.

Contact

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

Email

registration@ncpers.org

Link: <http://www.ncpers.org/teds>

Conference: Accredited Fiduciary (NAF) Program

Start Date: May 18, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 19, 2019

Location: Austin, Texas

Alternative Date(s) & Location(s) October 26-27, 2019, New Orleans LA

Topic Area: Board Governance & Leadership

Attendance: Members Only

This is an accreditation program specifically designed and tailored for public pension governance. It divides plan governance, oversight and administration into four modules. Each module delves into the fundamental components and strategies necessary for governing a public pension fund, allowing trustees and plan staff to walk away with the key competencies critical to their fiduciary responsibilities. Offered two modules at a time, upon completion of all four modules (in any order), participants will earn their Accredited Fiduciary (AF) designation. It is recommended that participants complete the Trustee Educational Seminar first.

- Module 1 – Governance and the Board's Role
- Module 2 – Investment and Finance
- Module 3 – Legal, Risk Management and Communication
- Module 4 – Human Capital

See the website for more information about the program.

Fees

\$1,020 - for two modules
\$205 discount for registration by April 15, 2019.

Contact

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

Email

registration@ncpers.org

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

Conference: Advanced Trustee Studies

Start Date: May 18, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 19, 2019

Location: Austin, Texas

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

Topic Area: Board Governance & Leadership

Attendance: Members Only

This program is designed for advanced trustees who seek a more intensive, in-depth learning experience. 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 change from year to year and 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.

See the website for more information about the program.

Fees

\$665
\$205 discount for registration by April 15, 2019.

Contact

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

Email

registration@ncpers.org

Link: <http://www.ncpers.org/teds>

Conference: Annual Conference and Exhibition

Start Date: May 19, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 22, 2019

Location: Austin, Texas

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

Topic Area: General

Attendance: Members Only

This conference provides a multitude of educational offerings for its members at all levels of experience. These opportunities will help you develop the knowledge, skills, and ideas you need to better serve your fund or union, move forward in your professional development, and engage effectively with colleagues across the country

See the website for more information about the conference.

Fees

\$1,020
\$205 discount for registration by April 25, 2019.

Contact

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

Email

registration@ncpers.org

Link: <http://www.ncpers.org/ace>

Conference: ESG Investing

Start Date: May 21, 2019

Organizer: Pensions & Investments

End Date: May 21, 2019

Location: Boston, Massachusetts

Alternative Date(s) & Location(s) May 14, 2019, Chicago IL
May 16, 2019, San Francisco CA
May 23, 2019, New York NY

Topic Area: DC Plans

Attendance: Open To All

This conference attracts top institutional investors who are noted for being forward-thinking and dedicated to managing sustainable long-term investments.

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

pi-registration@pionline.com

Link: <https://conferences.pionline.com/conference/esg-breakfast/2019>

Course: Human Resources & Compensation Committee Effectiveness

Start Date: May 21, 2019

Organizer: Institute of Corporate Directors

End Date: May 21, 2019

Location: Vancouver, British Columbia, Canada

Alternative Date(s) & Location(s) May 13, 2019, Toronto ON
May 15, 2019, Ottawa ON
May 23, 2019, Calgary AB

Topic Area: Human Resources

Attendance: Open To All

This course was created to help directors develop deeper insights into issues such as CEO succession planning, executive compensation and incentive plans, human capital development beyond the CEO, and dealing with increased scrutiny of executive compensation plans by activist shareholders and proxy advisors.

See the website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: April 23, 2019

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/Short-Courses/HR-Compensation-Committee-Effectiveness.aspx>

Course: Human Resources & Compensation Committee Effectiveness

Start Date: May 23, 2019

Organizer: Institute of Corporate Directors

End Date: May 23, 2019

Location: Calgary, Alberta, Canada

Alternative Date(s) & Location(s) May 13, 2019, Toronto ON
May 15, 2019, Ottawa ON
May 21, 2019, Vancouver BC

Topic Area: Human Resources

Attendance: Open To All

This course was created to help directors develop deeper insights into issues such as CEO succession planning, executive compensation and incentive plans, human capital development beyond the CEO, and dealing with increased scrutiny of executive compensation plans by activist shareholders and proxy advisors.

See the website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: April 25, 2019

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/Short-Courses/HR-Compensation-Committee-Effectiveness.aspx>

Conference: ESG Investing

Start Date: May 23, 2019

Organizer: Pensions & Investments

End Date: May 23, 2019

Location: New York, New York

Alternative Date(s) & Location(s) May 14, 2019, Chicago IL
May 16, 2019, San Francisco CA
May 21, 2019, Boston MA

Topic Area: DC Plans

Attendance: Open To All

This conference attracts top institutional investors who are noted for being forward-thinking and dedicated to managing sustainable long-term investments.

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

pi-registration@pionline.com

Link: <https://conferences.pionline.com/conference/esg-breakfast/2019>

Course: NFP Program

Start Date: May 28, 2019

Organizer: Institute of Corporate Directors and Rotman School of Management (U of

End Date: May 29, 2019

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) May 13-14, 2019, Vancouver BC

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program focuses on key accountabilities and responsibilities of leaders of not-for-profit (NFP) organizations through extensive use of team-based learning to ensure participants learn from both faculty and their peers.

Attend this program and gain the following benefits:

- Understand your fiduciary duty
- Learn best practices in governance
- Build group decision-making skills
- Apply change management principles to elevate board effectiveness

See the website for more information about the program.

Fees

\$2,500 CAD + tax
Course full - accepting waitlist

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/NFP-Program.aspx>

Conference: Discussion Forum

Start Date: June 02, 2019

Organizer: International Centre for Pension Management (ICPM)

End Date: June 04, 2019

Location: Vancouver, Ontario, Canada

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

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.

More information about the Forum is not yet available.

Fees

Not available. Please contact the conference organizer.

Contact

Karen Clarke
Phone: 416.925.4153
Fax: 416.925.7377

Email

kclarke@icpmnetwork.com

Link: <http://icpmnetwork.com/icpm-events/discussion-forums/icpm-discussion-forum-vancouver-2019/>

Course: Private Equity Program

Start Date: June 03, 2019

Organizer: Said Business School, Oxford University - Approved by the CFA Institute

End Date: June 07, 2019

Location: Oxford, UK

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

Topic Area: Investments

Attendance: Open To All

This program incorporates the latest research findings of Oxford University's Private Equity Institute. Drawing on the latest analysis it will assess the opportunities, risks and developments in the sector including:

- Private equity portfolio allocations
- Quantifying fund performance
- Selecting and comparing funds
- Fund raising strategies
- Structuring private equity investments and the role, risks and limits of leverage
- Understanding the distribution of returns, fees and carried interest
- Co-investment opportunities
- Emerging markets private equity
- Exit routes

See the website for more information about the program.

Fees

£7,000

Contact

Steve Brewster
Business Development Team
Phone: +44 (0)1865 422727

Email

steve.brewster@sbs.ox.ac.uk

Link: <https://www.sbs.ox.ac.uk/programmes/oxford-private-equity-programme>

Course: Principles of Global Macro

Start Date: June 03, 2019

Organizer: BCA Research - Approved by the CFA Institute

End Date: June 04, 2019

Location: London, UK

Alternative Date(s) & Location(s) May 6-7, 2019, New York NY

Topic Area: Investments

Attendance: Open To All

BCA has been an independent provider of global investment research for over 65 years. Participants of its courses learn techniques that will enable them to interpret data and important economic developments from the perspective of an investment professional. This seminar will help you better assess macro risks and opportunities. You will:

- Focus on the analytical methods and investment strategies developed for macroeconomics, sector analysis and quantitative modelling.
- Learn techniques that will enable you to interpret data and important economic developments
- Explore how movements in certain assets can influence returns in other financial assets.
- Look at important and interesting questions, such as why a strong currency implies lower bond yields, and how lower interest rates can boost equity multiples.
- Gain accessible methods that are critical to understanding how markets work.

See the website for more information about the program.

Fees

\$3,795

Contact

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

Email

academy@bcaresearch.com

Link: <https://interactive.bcaresearch.com/academy/principles-of-macroeconomics-719PC-4670ZC.html?>

Course: Value Investing

Start Date: June 04, 2019

Organizer: Columbia Business School

End Date: June 06, 2019

Location: New York, New York

Alternative Date(s) & Location(s) December 3-5, 2019, New York, NY

Topic Area: Investments

Attendance: Open To All

Based on the Ben Graham or Warren Buffett approach to allocating capital, this exclusive program will teach the frameworks and processes of investing that some of the most successful investors in the world employ to manage and preserve capital.

You will learn to use quantitative valuation techniques, such as arbitrage, asset-based approaches and the earning power method, and you will effectively combine those tools with strategic methodologies for estimating franchise value. Three real-world case studies enable more precise estimation of investment risk and improve your ability to manage a value portfolio.

See the website for more information about the program.

Fees
\$7,500

Contact
Liz N. Schultz
Senior Associate Director,
Learning Solutions
Phone: 212-854-7613

Email
Lns11@gsb.columbia.edu

Link: <https://www8.gsb.columbia.edu/execed/program-pages/details/61/VI?sourceid=finder>

Conference: Plan Sponsor National Conference

Start Date: June 05, 2019

Organizer: Plan Sponsor

End Date: June 07, 2019

Location: Washington, District of Columbia

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

Topic Area: General

Attendance: Open To All

This conference brings together a cross section of the industry - plan sponsors, retirement plan advisers and providers that support plans and participants meet, also getting to dialog with legislative, legal and policy thought leaders. The conference will cover current trends and best practices, while discussing what lies ahead in retirement plan design, participant engagement and education, and investment options and solutions, as well as, legislative and regulatory updates.

See the website for more information about the conference.

Fees
No charge for plan sponsors.

Contact
Carol Popkins
Phone: 203-461-0985

Email
carol.popkins@strategic-i.com

Link: <https://www.plansponsor.com/events/2019psnc/>

Conference: Defined Contribution Program

Start Date: June 05, 2019

Organizer: International Centre for Pension Management (ICPM) - jointly with NEST

End Date: June 06, 2019

Location: Vancouver, Ontario, Canada

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

Topic Area: General

Attendance: By Invitation Only

This program will take place immediately following the ICPM Discussion Forum. The goal of the event is to bring together asset owners, academics, policy-makers and selected industry representatives to discuss the major issues facing DC systems globally and to highlight best practice in responding to those issues. Program topics include:

- High-level Overview of Issues for DC systems
- System Design Challenges: Reaching New Groups of Savers
- Innovation in DC-Investment Design & Retirement Income Design
- Changing Saver Behaviour – What Works?
- What Can We Learn from Fintech?
- Future Innovation and Opportunity
- Increasing Trust and Transparency

Fees

Not available. Please contact the conference organizer.

Contact

Karen Clarke
Phone: 416.925.4153
Fax: 416.925.7377

Email

kclarke@icpmnetwork.com

Link: <http://icpmnetwork.com/icpm-events/discussion-forums/icpm-discussion-forum-vancouver-2019/>

Conference: Leadership Development Conference

Start Date: June 06, 2019

Organizer: The Conference Board

End Date: June 07, 2019

Location: San Diego, California

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

Topic Area: Human Resources

Attendance: Open To All

The theme of this conference is Leadership, Culture and Context Matter: Building Capability Throughout the Pipeline.

By attending this conference, you will:

- Learn how to develop a pipeline of leaders who will lead effectively in the next decade.
- Better understand the skills and attributes that future leaders must possess.
- Discover today's latest trends and practical solutions for developing leaders.
- Gain insights, ideas, and inspiration from top researchers and practitioners.
- Discover innovative solutions to strengthen the capability of leaders at all levels.
- Explore leadership behavior that engages employees and drives culture.
- Network and collaborate with your leadership development peers.

See website for more information about the conference.

Fees

\$2,895 - non-members
\$2,395 - members

Contact

Phone: +1 212 339 0345
Fax: +1 212 836 9740

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=3026>

Course: Annual Conference

Start Date: June 06, 2019

Organizer: London School of Economics, Paul Woolley Centre - In collaboration with

End Date: June 07, 2019

Location: London, UK

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

Topic Area: Investments

Attendance: Open To All

The Paul Woolley Centre undertakes research that aims at understanding the workings of capital markets and the social efficiency of allocations these markets achieve. The research emphasises the role of financial intermediaries (e.g. investment banks, mutual, hedge, and pension funds) in influencing prices and allocations. This conference will focus on Fintech and Financial Markets. It will explore questions such as:

- What are the comparative advantages and stability risks arising from the activity of "bigtech" technology firms in financial markets?
- What are the benefits and risks of 'peer-to-peer (P2P)' finance relative to more traditional forms of intermediation? And
- How might distributed ledger technology (DLT) and similar advances affect financial contracts and the financial system?

See the website for more information about the conference.

Fees

Not available. Please contact conference organizer.

Contact

Dimitri Vayanos
Phone: +44 (0)20 7955 6382

Email

fmg.vayanos@lse.ac.uk

Link: <https://www.lse.ac.uk/fmg/paul-woolley-centre/events/secure/12-annual-paul-woolley-centre-conference>

Conference: Trustees' Roundtable

Start Date: June 07, 2019

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: June 07, 2019

Location: Glendale, California

Alternative Date(s) & Location(s) October 25, 2019, Oakland CA

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.

More information about the conference is available exclusively to CALAPRS member systems and sponsors. Please visit the website to 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/events/EventDetails.aspx?id=1202792&group=>

Course: Investment Strategies and Portfolio Management

Start Date: June 10, 2019

Organizer: The Wharton School, University of Pennsylvania

End Date: June 14, 2019

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) October 21-25, 2019, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program provides a solid understanding of today's investment landscape and the tools and theories for developing and measuring the performance of portfolios. It provides actionable theories and practical tools for addressing asset allocation, risk management, performance measurement, and investment policies. It explores individual asset classes, including bonds, hedge funds, private equity, derivatives, real estate, and international markets to help participants better understand when to include these investments in their portfolios. Session topics include:

- Modern Portfolio Theory
- Performance Measurement
- Evaluating Managers and Strategies
- Advanced Asset Allocation
- Investment Policy
- Outlook for the Economy and Navigating Its Risk

See the website for more information about the program.

Fees

\$10,950
Fee includes lodging and most 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/investment-strategies-and-portfolio-management>

Course: Oxford Chicago Valuation Program

Start Date: June 10, 2019

Organizer: Said Business School, Oxford University

End Date: June 14, 2019

Location: Oxford, UK

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

Topic Area: Investments

Attendance: Open To All

This program, offered in partnership with the University of Chicago Booth School of Business, is designed to provide participants with advanced valuation knowledge in a condensed timeframe. Industry guest speakers explore and demonstrate the finance and capital structures that affect valuation. Following an accelerated recap of theory, participants will compare valuation in corporate M&A and private equity using real deals. They will study real-life cases presented by investment banks and PE firms applying models to transactions in:

- Corporate M&A and restructuring
- LBO
- Growth capital
- Infrastructure
- Real Estate
- Distress and special situations

See the website for more information about the program.

Fees

£7,000

Contact

Steve Brewster
Business Development Team
Phone: +44 (0)1865 422727

Email

steve.brewster@sbs.ox.ac.uk

Link: <https://www.sbs.ox.ac.uk/programmes/oxford-chicago-valuation-programme>

Conference: Defined Contribution Roundtable

Start Date: June 10, 2019

Organizer: Institutional Investor

End Date: June 11, 2019

Location: Apella, New York

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

Topic Area: DC Plans

Attendance: By Invitation Only

This roundtable provides attendees with the information, tools, and access to the peer expertise they need to meet their scheme's objectives and to help their participants achieve a secure retirement. The audience will be formed primarily of plan sponsors, and that peer group will also comprise the bulk of the speaking faculty at this event, supplemented by experts on plan design, enhancing participant outcomes, retirement income solutions, and the other issues uppermost on the minds of plan sponsors.

See the website for more information about the conference.

Fees

No fee. Limited to "qualified" DC plan sponsors. Please contact the conference organizer.

Contact

Madeline Heckman
Phone: (212) 224-3640
Fax: (212) 224-3802

Email

madeline.heckman@institutionalinvestor.com

Link: <https://www.iiconferences.com/DC-Institute/Defined-Contribution-Roundtable>

Course: Leading from the Chair

Start Date: June 10, 2019

Organizer: INSEAD

End Date: June 12, 2019

Location: Fontainebleau, Switzerland

Alternative Date(s) & Location(s)

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program provides board chairs with the opportunity to discover, share and practice techniques for achieving higher levels of board effectiveness. From setting direction and shaping strategy to acting as the pivot between the board, CEO and external stakeholders, the demands and challenges facing chairs are ever-increasing. In this context, the need for an exceptional chair has never been more crucial in board effectiveness and influencing organizational performance and direction. This program is designed to sharpen your skills for leading an effective and high-performing board, which can effectively set and implement the company's direction and strategy.

See the website for more information about the program.

Fees

€ 7,250 + VAT

Contact

Phone: +33 (0)1 60 72 41 27

Email

LC_Contact@insead.edu

Link: <https://www.insead.edu/executive-education/corporate-governance/leading-from-the-chair>

Course: Project and Infrastructure Finance

Start Date: June 10, 2019

Organizer: London Business School

End Date: June 14, 2019

Location: London, UK

Alternative Date(s) & Location(s) December 2-6, 2019, London, UK

Topic Area: Investments

Attendance: Open To All

This program will provide you with the practical skills and expertise to manage the process of valuing, financing and structuring project and infrastructure finance deals. You will study the project and infrastructure finance process from start to finish and gain a thorough understanding of how it works by: analyzing international case studies, collaborating with fellow participants and developing a deeper understanding of global dynamics.

You will learn about:

- Creating value through project and infrastructure finance
- Project versus corporate finance
- Financing, valuing and structuring large- scale infrastructure projects
- Analyzing project risks and rewards
- Optimally restructuring projects in distress
- Public-private Partnerships (PPP) and private finance initiatives (PFI)
- Project finance in emerging markets.

See the website for more information about the program.

Fees

£7,500

Contact

David Ratcliffe, Program Associate

Phone: +44 (0)20 7000 7051

Email

finance@london.edu

Link: <https://www.london.edu/executive-education/finance/project-and-infrastructure-finance?display=expanded>

Course: Geopolitics and Investing

Start Date: June 10, 2019

Organizer: BCA Research - Approved by the CFA Institute

End Date: June 10, 2019

Location: Washington, District of Columbia

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

Topic Area: Investments

Attendance: Open To All

BCA has been an independent provider of global investment research for over 65 years. Geopolitical analysis is an essential component of a sound investment strategy. Shifts in the global balance of power away from the U.S., growing demands for populist policies in Anglo-Saxon economies, and the 'crisis of expectations' among EM middle classes reinforce the view that geopolitical risk to investment portfolios is not a fad.

The course combines seventy years of macroeconomic research with geopolitical risk analysis. The analytical framework regards geopolitics as either a risk or an opportunity, recognizing the need to preserve capital and/or seek profits as events are mispriced in the market. The course focuses on the geopolitical and macroeconomic realities that constrain policymakers' options, zeroing in on the investment implications and consequences of their decisions.

See the website for more information about the program.

Fees

\$2,500

Contact

Phone: +1 514 499 9550

Toll-free: 1 800 724 2942

Email

academy@bcaresearch.com

Link: <https://interactive.bcaresearch.com/academy/geopolitics-and-investing-719PC-4676QU.html?>

Course: Value Investing (Online): Making Intelligent Investment Decisions

Start Date: June 11, 2019

Organizer: Columbia Business School

End Date: August 12, 2019

Location: Online

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

Topic Area: Investments

Attendance: Open To All

Legendary investors like Warren Buffett and Mario Gabelli have been guided by the value investing principles during their entire careers. It's an investment approach that helps investors identify, research, and buy securities priced well below their true market value.

This online program is designed to give you a strong foundation in the value investing process. It will give you tools and strategies to collect and analyze information as well as an integrated framework that teaches you how to identify opportunities for investment that others may miss. The program covers questions such as:

- Does diversification create value?
- How do I factor in economies of scale, first mover advantage, and barriers to entry?
- When does the value investor know when to buy?
- When does growth create value?

See the website for more information about the program.

Fees

\$3,750

Contact

Emeritus
Phone: +1-315-982-5094 and
+1-315-277-2746

Email

columbia@emeritus.org

Link: <https://www8.gsb.columbia.edu/execed/program-pages/details/2303/VIO?sourceid=finder>

Course: Board Risk Oversight and Insight Program

Start Date: June 11, 2019

Organizer: Global Risk Institute & Rotman School of Management, University of

End Date: June 12, 2019

Location: Toronto, Ontario, Canada

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

Topic Area: Board Governance & Leadership

Attendance: Members Only

This program covers key aspects of risk oversight responsibilities of boards and their directors in the financial services sector. It provides:

- Exposure to risk oversight best practices and emerging trends
- Opportunities to gain insight regarding risk management practices and approaches employed by the boards of other GRI member financial institutions
- An appreciation and application of risk appetite frameworks including fostering a healthy risk culture
- Opportunities to explore with faculty experts, as well as board peers, the types of questions that directors should be posing to corporate risk professionals
- Networking with director peers in an interactive learning environment

See the website for more information about the program.

Fees

Not available.
Please contact conference organizer.

Contact

Maria Montes
Events Manager
Phone: +1 (416) 306-1182
Fax: +1 (416) 306-1450

Email

mmontes@globalriskinstitute.org

Link: <http://globalriskinstitute.org/education/board-risk-oversight-and-insight/>

Conference: Chief Officers Summit

Start Date: June 12, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: June 14, 2019

Location: Chicago, Illinois

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

Topic Area: Board Governance & Leadership

Attendance: Open To All

This summit is the culmination of extensive research and engagement with NCPERS members and builds upon the successful launch of the CIO Summit in June 2018. It features dual tracks for CIOs and CEOs. Both programs focus on the distinct challenges mid-market plans face and provide plan executives the opportunity to collaboratively work together in solutions-focused small group discussions. The summit will feature:

- A target audience of chief officers from funds with assets between \$2 billion and \$60 billion.
- CIO and CEO Summit agendas developed by advisory faculties of peers.
- Solutions-focused group discussions after each general session.
- Limited attendees to promote active participation and discussion.
- Educational tracks closed to marketers from the vendor community.

See the website for more information about the conference.

Fees

\$1,000 - non-members
\$650 - members

Contact

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

Email

registration@ncpers.org

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

Course: High Performance Boards

Start Date: June 17, 2019

Organizer: IMD Business School

End Date: June 20, 2019

Location: Lausanne, Switzerland

Alternative Date(s) & Location(s) May 6-9, 2019, Lausanne
Sep 30-Oct 3, 2019, Lausanne
November 25-28, 2019, Lausanne

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is for supervisory board members and chairpersons. It is designed to prepare your board to face the challenges of a complex world.

Specifically the program will help you:

- Identify what makes best practice boards
- Drive positive board culture
- Evaluate and mitigate risk and maximize opportunities through strategic board involvement
- Ensure successful succession plans
- Learn how to manage a board in crisis

See the website for more information about the program.

Fees

CHF 11,500

Contact

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

Email

N/A

Link: <http://www.imd.org/hpb/board-governance/>

Course: Board Oversight of Strategy

Start Date: June 21, 2019

Organizer: Institute of Corporate Directors and Rotman School of Management (U of

End Date: June 21, 2019

Location: Halifax, Nova Scotia, Canada

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

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course will help directors successfully engage in the strategic oversight process. Developed in partnership with CPA Canada and based on CPA Canada's Overseeing Strategy: A Framework for Boards of Directors, participants will learn how to apply the four-phase framework, when to get involved and how to effectively participate in board oversight activities in different situations and business environments.

See the website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: May 24, 2019

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <https://www.icd.ca/Courses/Short-Courses/Board-Oversight-of-Strategy.aspx>

Course: Investment Management Workshop

Start Date: June 23, 2019

Organizer: Harvard Business School and CFA Institute

End Date: June 27, 2019

Location: Cambridge, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

The theme of this workshop is: Investing and Strategic Decision-Making. For over 50 years, this workshop has convened the world's top principals, portfolio managers, and executives to explore the latest industry strategies and best practices. It is focused on asset management, business strategy and development, and investment strategy and execution. You will gain fresh insights into how the investment management industry is evolving—and how those changes could affect your strategies and your organization.

Key benefits of attending include the following:

- Gain strategic insights into all segments of the industry
- Analyze complex challenges and potential solutions more effectively
- Broaden your range of potential investment and allocation strategies
- Expand your personal and professional network

See the website for more information about the workshop.

Fees

\$10,500
\$9,800 for CFA members

Contact

Phone: +1-434-951-5499
Fax: +1 (434) 951-5262
Toll-free: 1-800-247-8132

Email

university@cfainstitute.org

Link: <https://www.exed.hbs.edu/investment-management-workshop/>

Conference: Summer Roundtable

Start Date: July 10, 2019

Organizer: Pacific Pension Institute

End Date: July 12, 2019

Location: Chicago, Illinois

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

Topic Area: Risk Management

Attendance: Members Only

Pacific Pension & Investment Institute (PPI) convenes global pension and investment thought leaders for in-depth dialogue and knowledge sharing on issues facing long-term institutional investors in Asia and the Pacific Rim. PPI is a global organization with individual and institutional members from leading pension funds, sovereign wealth funds, endowments, foundations, commercial asset management and other investment experts.

The roundtables provide members a unique opportunity to explore issues related to long-term investment. Limited to roughly 120 senior executives from the institutional investor community, these programs offer a forum for honest and confidential discussions on important themes and trends that affect asset allocation, risk management, and investment decisions

See the website for more information about the conference.

Fees

Not available.
Please contact the conference organizer.

Contact

Phone: +1 (415) 576-1187
Fax: +1 (415) 576-1189

Email

info@ppi.institute

Link: <https://www.ppi.institute/programs/>

Course: Multi Asset Investment Products and Solutions Seminar

Start Date: July 16, 2019

Organizer: Yale School of Management and EDHEC-Risk Institute - Approved by the

End Date: July 18, 2019

Location: New Haven, Connecticut

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

Topic Area: Investments

Attendance: Open To All

This program consists of three seminars whose focus is on utilizing the latest academic insights to help investment professionals better understand and implement advanced investment approaches and methodologies. Participants can complete all three seminars and receive the joint Yale School of Management-EDHEC-Risk Certificate in Risk and Investment Management, or attend a single session for a more focused study. The second seminar of this series provides an in-depth discussion of:

Day 1: Risk and asset allocation decisions

Day 2: Liability-driven and goal-based investing solutions

Day 3: Exploiting predictability in asset class and active management returns

See the website for more information about the seminar and to download a brochure.

Fees

\$6,650

Contact

David Pramer, Yale School of Management
Phone: +1 203 432 6268

Email

david.pramer@yale.edu

Link: <https://som.yale.edu/programs/executive-education/for-individuals/finance/advanced-risk-and-investment-management>

Conference: Annual Conference

Start Date: July 16, 2019

Organizer: International Corporate Governance Network (ICGN)

End Date: July 18, 2019

Location: Tokyo, Japan

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

Topic Area: Corporate Governance

Attendance: Open To All

This event will be hosted by the Tokyo Stock Exchange. Over 600 influential governance professionals will convene to discuss progress towards Japan's Revitalisation Strategy to enhance long term corporate value contributing to sustainable economies world-wide. The three-day event will address the impact of corporate governance and investor stewardship reforms and highlight future priorities for companies, investors and stakeholders alike.

See the website for more information about the conference.

Fees

£1,070 - non-member
£750 - member
Registration deadline: June 28, 2019

Contact

Elle Thomas
Head of Events
Phone: +44 (0) 207 612 7011

Email

elizabeth.thomas@icgn.org

Link: <https://www.icgn.org/events/icgn-2019-annual-conference-tokyo>

Conference: Trustee Workshop

Start Date: July 21, 2019

Organizer: National Council on Teacher Retirement (NCTR)

End Date: July 24, 2019

Location: Berkeley, California

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

Topic Area: General

Attendance: Members Only

The National Council on Teacher Retirement (NCTR) is constituted as an independent association dedicated to safeguarding the integrity of public retirement systems in the United States and its territories to which teachers belong and to promoting the rights and benefits of all present and future members of the systems.

This workshop is presented in affiliation with the UC Berkeley Center for Executive Education at the Haas School of Business. It is developed with input from board trustees on the NCTR Trustee Education Committee and is designed by and for public pension board trustees. Workshop agenda items offer a wide range of educational content for both new and experienced trustees.

See the website for more information about the conference.

Fees

\$2,550
Registration opens in May 2019.

Contact

Robyn Wheeler
Phone: (916) 509-7260

Email

wheeler@nctr.org

Link: <https://nctr.org/upcoming-events/workshops-2/>

Course: Compensation Committees: New Challenges, New Solutions

Start Date: July 21, 2019

Organizer: Harvard Business School, Harvard University

End Date: July 23, 2019

Location: Cambridge, Massachusetts

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

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program, by examining critical market and regulatory issues, enables compensation committee chairs and members to design more effective compensation programs. You will explore best practices for aligning executive pay to business strategy and company goals and for meeting shareholder expectations as the regulatory climate evolves. The program will enable you and your committee to contribute more effectively to long-term performance, corporate profitability, and employee satisfaction.

See the website for more information about the program

Fees

\$6,700
Covers tuition, books, accommodations & most meals

Contact

Phone: +1-617-495-6555
Toll-free: 1-800-427-5577

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/compensation-committees/>

Course: International and Emerging Market Investing

Start Date: July 22, 2019

Organizer: Wharton School, University of Pennsylvania - for the IFEBP

End Date: July 24, 2019

Location: San Francisco, California

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

Topic Area: Investments

Attendance: Open To All

This program is designed to provide insight into the global marketplace to those who already have a solid grasp on basic investment topics. Discover investment opportunities and risks of international and emerging countries and how to navigate these risks.

- Globalization and Global Economic Markets
- Emerging Markets: Opportunities and Risks
- Emerging Markets: A Financial Force
- Mechanics of International Diversification
- Developed Market Equities
- Emerging Market Equity
- Global Bonds and Exchange Rates
- Foreign Investment Vehicles—Funds, MNCs, ADRs and Exchange Traded Funds (ETFs)

See the website for more information about the program.

Fees

\$4,785 - non-members
\$4,455 - members
\$300 discount for registration by June 10, 2019

Contact

Phone: (262) 786-6710
Toll-free: (888) 334-3327

Email

edreg@ifebp.org

Link: <http://www.ifebp.org/education/certificateprograms/wharton/Pages/international-and-emerging-market-investing-19h6.aspx>

Course: Public Pension Investment Management Program
Organizer: SACRS & Haas School of Business, UC Berkeley
Location: Berkeley, California

Start Date: July 22, 2019
End Date: July 24, 2019
Alternative Date(s) N/A & Location(s)

Topic Area: Investments

Attendance: Members Only

This course, Modern Investment Theory & Practice for Retirement Systems, is a four-day course offering SACRS' members in-depth knowledge on today's successful investment models and strategies. They will learn how to practically integrate these methods immediately into their own plan administration, advancing their skills and elevating the collective expertise of SACRS' membership. Completion of the course earns them a certificate of achievement from UC Berkeley.

This program is widely popular and limited to 30-40 people. System members have registration priority. See the website for more information about the program.

Fees
 \$2,500

Contact
 Phone: 916-441-1850
 Fax: 916-441-6178

Email
 sacrs@sacrs.org

Link: <https://sacrs.org/events/sacrs-uc-berkeley-program/>

Course: CFA Institute Seminar for Global Investors
Organizer: CFA Institute - Hosted by CFA Society Chicago
Location: Chicago, Illinois

Start Date: July 22, 2019
End Date: July 25, 2019
Alternative Date(s) N/A & Location(s)

Topic Area: Investments

Attendance: Open To All

This seminar (previously known as the Financial Analysts Seminar), held each year for the last 64 years, gathers a faculty of leading investors and researchers to provide their insights, perspectives, and practical takeaways to a global audience of asset managers and asset owners. The seminar will cover an array of investment topics such as:

- Effects of global macroeconomic trends,
- Geopolitics
- Investment policy
- Improving data analysis
- Application of new technologies in traditional and quantitative portfolio management,
- Development and allocation of a range of investment strategies, asset classes, and risks.

See the website for more information about the seminar.

Fees
 \$3,495
 \$2,995 - CFA members
 \$500 discount for registration by June 14, 2019

Contact
 Phone: +1-434-951-5499
 Fax: +1 (434) 951-5262
 Toll-free: 1-800-247-8132

Email
 programs@cfainstitute.org

Link: <https://www.cfainstitute.org/en/events/conferences/seminar-for-global-investors>

Course: Audit Committees in a New Era of Governance
Organizer: Harvard Business School, Harvard University
Location: Cambridge, Massachusetts

Start Date: July 24, 2019

End Date: July 26, 2019

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

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program explores the best practices that your audit committee can use to fulfill its mandate and increase its strategic contribution. You will acquire the frameworks to align corporate strategy with financial reporting—and help your company operate more effectively in today's rigorous market and regulatory environment. The program prepares you to manage the creative tension between the compliance and strategic roles of the audit committee. While improving your ability to ensure compliance, transparency, and accountability, you will learn how to move your company beyond a compliance mentality toward strategic financial reporting and effective risk management.

See the website for more information about the program.

Fees
 \$6,700
 Covers tuition, books, accommodation & most meals

Contact
 Phone: +1-617-495-6555
 Toll-free: 1-800-427-5577

Email
 executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/audit-committees-new-era-governance/>

Conference: Annual Conference

Start Date: August 03, 2019

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: August 07, 2019

Location: Williamsburg, Virginia

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

Topic Area: General

Attendance: Members Only

NASRA was founded in 1955 as a non-profit association whose members are the directors of the nation's state, territorial, and largest statewide public retirement systems. Its members oversee retirement systems that hold more than two-thirds of the \$4.2 trillion held in trust for 15 million working and 10 million retired employees of state and local government. Its mission is to serve its members in managing sustainable public employee retirement systems through research, education, and collaboration.

The annual conference features leaders in the fields of retirement plan investment and administration covering a variety of subjects including investment management, world events applicable to the pension industry, the economy, human resources, trends, and more.

More information about the conference is not yet available.

Fees
 Not yet available

Contact
 Mary Hiatte
 Phone: 202.624.1418

Email
 mary@nasra.org

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

Course: Principles of Pension Management for Trustees
Organizer: CALAPRS - In association with Pepperdine University
Location: Malibu, California

Start Date: August 26, 2019
End Date: August 29, 2019
Alternative Date(s) & Location(s) N/A

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 courses.

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

Fees
 Not available. Please contact the conference organizer.
 Registration opens Spring 2019.

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=1131365&group=>

Course: Governing for Nonprofit Excellence: Critical Issues for Board
Organizer: Harvard Business School, Harvard University
Location: Cambridge, Massachusetts

Start Date: September 04, 2019
End Date: September 07, 2019
Alternative Date(s) & Location(s) N/A

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program delves into the critical issues facing nonprofit board leaders. You will examine the latest governance frameworks, performance and measurement systems, oversight models for ensuring accountability and compliance, and the dynamics between boards and CEOs. As you gain insight into four essential competencies of nonprofit governance—board leadership, strategic stewardship, performance measurement, and financial oversight—you will learn how to drive the strategic and organizational transformation that enables your nonprofit organization to thrive. With a deeper understanding of board roles and responsibilities, you will emerge a stronger leader and a more strategic steward for your organization.

See the website for more information about the program.

Fees
 \$5,000
 Covers tuition, books, accommodation & most meals

Contact
 Phone: +1-617-495-6555
 Toll-free: 1-800-427-5577

Email
executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/governing-nonprofit-excellence-critical-issues-board-leadership/>

Conference: Annual Conference

Start Date: September 08, 2019

Organizer: National Association of Government DC Administrators (NAGDCA)

End Date: September 11, 2019

Location: New Orleans, Louisiana

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

Topic Area: DC Plans

Attendance: Members Only

This conference brings together the brightest minds in the government defined contribution industry to discuss the most innovative solutions available for creating a secure retirement for public sector workers. It also offer an annual Washington update session where its Government Affairs Director will walk members through the most important news coming from Capitol Hill.

More information about the conference is not yet available.

Fees

\$700
\$100 discount for registration by July 16, 2019

Contact

Carly Miller
Phone: (859) 514-9161

Email

cmiller@amrms.com

Link: <https://www.cvent.com/events/2019-nagdca-annual-conference/event-summary-b6a1e215d8c845b187e7dba9f88fa6f7.aspx?RefID=homepage>

Conference: Fall Conference

Start Date: September 08, 2019

Organizer: Journal of Investment Management - Approved by the CFA Institute

End Date: September 10, 2019

Location: Cambridge, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

This conference is titled Retirement Investing: The State of the Art Part II. The line-up of presentations will include the Keynote address by Robert Merton of the Sloan School of MIT and Nobel Laureate in Economic Sciences and Zvi Bodie, Bodie Associates.

This event is co-sponsored with the MIT Sloan Finance Group and Golub Center for Finance and Policy

More information about the conference is not yet available.

Fees

\$3,000 - guest seat (based on availability)
\$5,000 - annual membership (includes Spring & Fall Conferences)

Contact

Phone: (925) 299-7800
Fax: (925) 299-7815

Email

customerservice@joim.com

Link: <https://www.joim.com/conference-series/fall-2019-conference/>

Conference: PRI Academic Network Conference

Start Date: September 09, 2019

Organizer: Principles for Responsible Investment (PRI) - in collaboration with the

End Date: September 09, 2019

Location: Paris, France

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

Topic Area: Corporate Governance

Attendance: Members Only

This conference will be in collaboration with the Research Chair on Sustainable Finance and Responsible Investments (Chaire FDIR) at Toulouse School of Economics and École Polytechnique. It precedes PRI in Person 2019, taking place in Paris.

The conference delivers the latest research on responsible investment practices. It aims to bridge the gap between academic researchers in sustainability and investors leading the way in RI. The event offers a unique opportunity for academics and investors to engage with each other, learn and discuss the latest insights, and to network.

The Academic Network is a vibrant and flourishing international community of over 4,000 academics and investment practitioners on ESG and investment.

See the conference website for more information and a preliminary agenda.

Fees

€125 + VAT

Contact

Meegan Marais

Phone: +44 (0)20 3714 3177

Email

events@unpri.org

Link: <https://www.unpri.org/events/pri-academic-network-conference-2019/4039.article>

Conference: PRI in Person

Start Date: September 10, 2019

Organizer: Principles for Responsible Investment (PRI)

End Date: September 12, 2019

Location: Paris, France

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

Topic Area: Corporate Governance

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 is a leading global conference on responsible investment, offering a platform for PRI signatories and other investment professionals to learn, network and collaborate. The annual event allows attendees to discuss topical issues and share experiences from their own organisation and region with peers from around the world. The conference is expected to have 1,500 delegates and six streams of content. Over 100 expert speakers from across the investment industry and beyond will showcase the latest innovations in responsible investment practice and debate the impact of emerging ESG issues and global trends.

See the website for more information about the conference.

Fees

€ 1450 - non-signatories

€ 1825 - signatories

Plus 20% VAT.

Contact

Ilga Miglane

Phone: +44 (0)20 3714 3177

Email

events@unpri.org

Link: <https://www.unpri.org/events/pri-in-person-2019/3593.article>

Conference: Public Pension Funding Forum

Start Date: September 11, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: September 13, 2019

Location: New York, New York

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

Topic Area: Pension Plan Policy

Attendance: Open To All

The issue of pension funding gap, real or not, is often used to change pension plans as we know them. The most common solutions revolve around increasing employee and employer contributions, reducing benefits, and converting lifetime guarantee of defined benefit pensions into do it yourself pension schemes.

This forum will examine the obstacles that stand in the way of closing public pension funding gap and explore new solutions to overcome such obstacles, including better risk management in economic cycles, use of new and improved debt instruments, and closing tax loopholes.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fees: \$750
Registration will open in June 2019.

Contact

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

Email

registration@ncpers.org

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

Conference: Fall Conference

Start Date: September 16, 2019

Organizer: Council of Institutional Investors

End Date: September 18, 2019

Location: Minneapolis, Minnesota

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

Topic Area: Corporate Governance

Attendance: Members Only

The Council of Institutional Investors (CII) is a nonprofit, nonpartisan association of pension funds, other employee benefit funds, endowments and foundations, with combined assets that exceed \$3.5 trillion. Its non-voting members include asset management firms with more than \$25 trillion under management. It 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.
Prospective members should contact conference organizer.

Contact

Michael Miller
Phone: 202.822.0800

Email

michael@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=9/18/2019&eventid=30

Course: Masterclass in Private Equity

Start Date: September 17, 2019

Organizer: London Business School

End Date: September 20, 2019

Location: London, UK

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

Topic Area: Investments

Attendance: Open To All

This program will help you develop a greater understanding of the global private equity industry. It sharpens your due diligence skills, empowers you to understand how deals are constructed, and advances your comprehension of the latest research, strategies and insights. You begin with the analysis of the asset then proceed through to the selection and acquisition processes, leading to final disposal and capital realization. You hear from top-level industry speakers immersed in the field, senior professionals working alongside the industry, corporate lawyers and investors. You review and discuss real-world examples of the challenging decisions these experts have had to make. The key topics covered are:

- Private equity as an asset class
- The structure of a private equity fund, how it operates and governs its portfolio companies
- Transaction and harvesting
- The complexities of deal-making, explored through analysis of recent industry deals.

See the website for more information about the program.

Fees

£6,300

Contact

David Ratcliffe, Programme Associate
Phone: +44 (0)20 7000 7051

Email

finance@london.edu

Link: <https://www.london.edu/executive-education/finance/masterclass-in-private-equity?display=expanded>

Conference: East Coast Private Markets Summit

Start Date: September 17, 2019

Organizer: Institutional Investor

End Date: September 17, 2019

Location: Boston, Massachusetts

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

Topic Area: Investments

Attendance: By Invitation Only

The theme for this conference is: Private Markets 2.0: Building a Future-Proof Portfolio. The largest asset owners across North America continue to show confidence in private markets. Allocations to an array of strategies across private equity, debt, infrastructure and real estate are on the rise, as institutional investors commit to building out and enhancing their private market programs. Yet, in a world where the outlook for the next ten years looks drastically different to the last ten, investors need to be aware of how new developments in the industry might disrupt and impact the way they invest. Rising rates, shrinking public markets, geopolitical tensions, technological advancement, and environmental risks are just a few.

More information about the conference is not yet available.

Fees

Not available. Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/3rd-Annual-East-Coast-Private-Markets-Summit>

Conference: Defined Contribution Institute

Start Date: September 19, 2019

Organizer: Institutional Investor

End Date: September 20, 2019

Location: Half Moon Bay, California

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

Topic Area: DC Plans

Attendance: By Invitation Only

The Institutional Investor DC Institute is a private membership organization for DC plan sponsors as well as the industry's leading asset management firms, providers, and consultants. Members come together for meetings which foster idea exchange and the achievement of common goals. The environment at these events is collegial, collaborative and confidential in accordance with Chatham House Rules. The agenda for each DC Institute meeting draws heavily on an incomparable well of industry insight contributed by our plan sponsor and expert attendees. Each program addresses the issues most relevant to the nation's plans.

More information about the conference is not yet available.

Fees

No fee. Limited to "qualified" DC plan sponsors. Please contact the conference organizer to register.

Contact

Madeline Heckman
Phone: (212) 224-3640
Fax: (212) 224-3802

Email

madeline.heckman@institutionalinvestor.com

Link: <https://www.iiconferences.com/DC-Institute/Defined-Contribution-Institute-Half-Moon-Bay>

Conference: Defined Contribution Institute

Start Date: September 19, 2019

Organizer: Institutional Investor

End Date: September 20, 2019

Location: Half Moon Bay, California

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

Topic Area: DC Plans

Attendance: By Invitation Only

The Institutional Investor DC Institute is a private membership organization for DC plan sponsors as well as the industry's leading asset management firms, providers, and consultants. Members come together for meetings which foster idea exchange and the achievement of common goals. The environment at these events is collegial, collaborative and confidential in accordance with Chatham House Rules. The agenda for each DC Institute meeting draws heavily on an incomparable well of industry insight contributed by our plan sponsor and expert attendees. Each program addresses the issues most relevant to the nation's plans.

See the website for more information about the conference.

Fees

No fee. Limited to "qualified" DC plan sponsors. Please contact the conference organizer to register.

Contact

Madeline Heckman
Phone: (212) 224-3640
Fax: (212) 224-3802

Email

madeline.heckman@institutionalinvestor.com

Link: <https://www.iiconferences.com/DC-Institute/Defined-Contribution-Institute-Half-Moon-Bay>

Course: Behavioral Risk Management **Start Date:** September 19, 2019
Organizer: Amsterdam Institute of Finance – Approved by the CFA Institute **End Date:** September 20, 2019
Location: Amsterdam, Netherlands **Alternative Date(s) N/A**
& Location(s)

Topic Area: Risk Management

Attendance: Open To All

This program presents a framework for managing risks that relate to human psychology. In this regard, virtually every major risk management failure, if not catastrophe, in recent years has had psychological pitfalls at its root. If you are responsible for risk management or wish to have a better awareness of risks within your organization, if you interact with risk managers, or if you are a risk manager yourself, then this program will help you better understand the psychology of risk. You will:

- Learn to identify how psychological hard wiring predisposes people to make systematic mistakes in the assessment and taking of risk
- Be able to assess how risk management culture determines levels of operational risk
- Measure the reflection of sentiment in pricing and its connection to value and risk
- Understand how behavioral frameworks can be used to foster a risk management mindset
- Build a behavioral toolkit through the use of case studies during the program

See the website for more information about the program.

Fees

€2,500

Contact

Phone: +31 (0)20 520 0160

Fax: +31 (0)20 520 0161

Email

info@aif.nl

Link: <https://www.aif.nl/program/behaviorial-risk-management/>

Conference: Making an Impact with ESG Investing Summit **Start Date:** September 19, 2019
Organizer: Institutional Investor **End Date:** September 19, 2019
Location: Amsterdam, Netherlands **Alternative Date(s) N/A**
& Location(s)

Topic Area: Investments

Attendance: By Invitation Only

This conference will bring together senior heads of ESG & impact investing from across the European institutional asset owner community. It will discuss the rapid evolution of products and strategies available across the ESG universe, and comes as a direct result of trends and importance from the asset owner community.

Issues under discussion will include, how to differentiate in an ESG led portfolio? Are asset owners being strategic in their approach to impact investing? Do asset owners fully understand some of the issues under each element of ESG and what is being prioritised? Are some investors relying less on rankings and more on instinct when it comes to these types of funds. When will the world catch up to fill the gap on standardising ESG investments?

More information about the conference is not yet available.

Fees

Not yet available. Please contact the conference organizer to register.

Contact

Alex Beveridge

Phone: +44 (0) 207 303 1742

Fax: +44 (0)207 303 1731

Email

abeveridge@iilondon.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Making-Impact-ESG-Investing-Summit>

Course: Private Equity

Start Date: September 23, 2019

Organizer: Amsterdam Institute of Finance – Approved by the CFA Institute

End Date: September 25, 2019

Location: Amsterdam, Netherlands

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

Topic Area: Investments

Attendance: Open To All

This program provides participants with a solid and critical understanding of the inner workings of private equity, including the operation of private equity funds, the ways and means of engineering buyouts and restructuring transactions, reporting and performance measurement, and the institutional investor perspective. The program will re-examine the assumptions behind the industry and provide a provocative, cross-country analysis of the ways and means of investing in growth, buyout and turnaround situations. You will:

- Analyze and understand the marketplace for private equity: size, trends, issues affecting the market and major players
 - Investigate offering memoranda of private equity funds with case studies from Europe
 - Understand the investment structures and return drivers used by private equity specialists
 - Learn the finer details of buyout term sheets and how to structure transactions
 - Review the key governance and control mechanisms issues in private equity
- See the website for more information about the program.

Fees

€3,600

Contact

Phone: +31 (0)20 520 0160
Fax: +31 (0)20 520 0161

Email

info@aif.nl

Link: <https://www.aif.nl/program/private-equity/>

Conference: Systematic Investment Symposium

Start Date: September 24, 2019

Organizer: Institutional Investor

End Date: September 25, 2019

Location: London, UK

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

Topic Area: Investments

Attendance: By Invitation Only

This conference will bring together those involved in allocating to, designing and implementing smart beta, factor-based investing and systematic strategies in general for high-level debate and presentations on the latest thinking in this field.

More information about the conference is not yet available.

Fees

Not yet available. Please contact the conference organizer to register.

Contact

Alex Beveridge
Phone: +44 (0) 207 303 1742
Fax: +44 (0)207 303 1731

Email

abeveridge@iilondon.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/4th-Annual-Systematic-Investment-Symposium>

Conference: Investment Management Summit

Start Date: September 24, 2019

Organizer: Financial Times (FT)

End Date: September 25, 2019

Location: London, UK

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

Topic Area: Investments

Attendance: Open To All

This summit, now in its sixth year, is the annual meeting point for the world's leading institutional investors, asset managers, regulators and influencers, a high level opportunity to discuss and dissect the latest market developments and their implications for portfolio planning and returns. Major questions for this year's agenda include:

- With many predicting the end of the current credit cycle, what is in store for the year ahead? Is a correction likely and what will be the trigger – corporate debt levels, interest rates, tapering?
- As ESG integration moves to the mainstream, what are the next steps to ensure investors can do well and do good?
- Which asset classes, from the traditional to the emerging, will perform amid rising volatility and unpredictable market conditions?

See the website for more information about the conference.

Fees

Limited number of complimentary tickets available for institutional investors. Please contact conference organizer.

Contact

Phone: +44 (0)20 7775 6653

Email

ftlive@ft.com

Link: <https://live.ft.com/Events/2019/FT-Investment-Management-Summit-2019>

Conference: Future of Index Investing Symposium

Start Date: September 24, 2019

Organizer: Institutional Investor

End Date: September 24, 2019

Location: London, UK

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

Topic Area: Investments

Attendance: By Invitation Only

The symposium will focus on the changing world of index and ETF investing. Through presentations and panels, fund selectors and ETF experts will examine how wealth managers and institutional investors should approach indexing/ETFs when constructing portfolios. What are some of the key strategic and tactical decisions facing allocators? Is bigger always better in this space, or is concentration risk becoming an issue for investors?

More information about the conference is not yet available.

Fees

Not available. Please contact the conference organizer to register.

Contact

Alex Beveridge
Phone: +44 (0) 207 303 1742
Fax: +44 (0)207 303 1731

Email

abeveridge@iilondon.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Future-Index-Investing>

Conference: Emerging Markets

Start Date: September 24, 2019

Organizer: Pensions & Investments

End Date: September 24, 2019

Location: Chicago, Illinois

Alternative Date(s) & Location(s) September 26, 2019, New York NY

Topic Area: Investments

Attendance: By Invitation Only

More information about the conference is not yet available.

Fees

Not yet available.
Please contact conference organizer.

Contact

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

Email

pi-registration@pionline.com

Link: <https://conferences.pionline.com/conference/emerging-markets/2019>

Conference: Investment Conference

Start Date: September 26, 2019

Organizer: BCA Research - Approved by the CFA Institute

End Date: September 27, 2019

Location: New York, New York

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

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.

This conference will bring together some of the top thinkers from the financial, economic and political worlds to uncover new investment opportunities, gain insights to shape your conviction and connect with hundreds of your peers from across the globe.

See the website for more information about the conference.

Fees

\$4,450 - 1-100 tickets sold
\$4,950 - 101-200 tickets sold
\$5,450 - 201-300 tickets sold
\$6,250 - 301-400 tickets sold

Contact

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

Email

support@bcaresearch.com

Link: <http://interactive.bcaresearch.com/investmentconference>

Conference: Emerging Markets
Organizer: Pensions & Investments
Location: New York, New York

Start Date: September 26, 2019
End Date: September 26, 2019
Alternative Date(s) & Location(s) September 24, 2019, Chicago IL

Topic Area: Investments

Attendance: By Invitation Only

More information about the conference is not yet available.

Fees

Not yet available.
 Please contact conference organizer.

Contact

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

Email

pi-registration@pionline.com

Link: <https://conferences.pionline.com/conference/emerging-markets/2019>

Course: High Performance Boards
Organizer: IMD Business School
Location: Lausanne, Switzerland

Start Date: September 30, 2019
End Date: October 03, 2019
Alternative Date(s) & Location(s) May 6-9, 2019, Lausanne
 June 17-20, 2019, Lausanne
 November 25-28, 2019, Lausanne

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is for supervisory board members and chairpersons. It is designed to prepare your board to face the challenges of a complex world.

Specifically the program will help you:

- Identify what makes best practice boards
- Drive positive board culture
- Evaluate and mitigate risk and maximize opportunities through strategic board involvement
- Ensure successful succession plans
- Learn how to manage a board in crisis

See the website for more information about the program.

Fees

CHF 11,500

Contact

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

Email

N/A

Link: <http://www.imd.org/hpb/board-governance/>

Course: Strategic Investment Management

Start Date: October 07, 2019

Organizer: London Business School

End Date: October 11, 2019

Location: London, UK

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

Topic Area: Investments

Attendance: Open To All

This program will help you gain a fuller understanding of key investment management themes and a practical understanding of equity and fixed-income portfolio management, including:

- Modern portfolio theory
- Fixed income and equity investments
- Strategic asset allocation
- Behavioral finance
- Performance evaluation
- Passive and active investment vehicles
- Portfolio optimization
- Risk management
- Alternative asset classes
- Current and future trends in asset management
- Macroeconomic trends

See the website for more information about the program.

Fees

£7,500

Contact

David Ratcliffe, Programme Associate

Phone: +44 (0)20 7000 7051

Email

finance@london.edu

Link: <https://www.london.edu/executive-education/finance/strategic-investment-management?display=expanded>

Course: Team Dynamics for Boards

Start Date: October 09, 2019

Organizer: IMD Business School

End Date: October 10, 2019

Location: Lausanne, Switzerland

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

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course will empower you to drive positive dynamics in your board through a deeper awareness of what happens below the surface when groups interact.

Specifically the program will help you:

- Understand the formal behavior dictated to board members by governance frameworks compared to the informal dynamics of a team
- Explore unconscious assumptions and hidden motivations that can derail board work
- Find the right balance for your board between supporting and challenging the CEO and top team
- Gain insights into your board's team dynamics and the behaviors required to improve team effectiveness

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

N/A

Link: <https://www.imd.org/tdb/team-dynamics-for-board-members/>

Conference: Annual Conference

Start Date: October 13, 2019

Organizer: National Council on Teacher Retirement (NCTR)

End Date: October 15, 2019

Location: Nashville, Tennessee

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

Topic Area: General

Attendance: Members Only

The National Council on Teacher Retirement (NCTR) is constituted as an independent association dedicated to safeguarding the integrity of public retirement systems in the United States and its territories to which teachers belong and to promoting the rights and benefits of all present and future members of the systems. NCTR membership includes 68 state, territorial, and local pension systems. These systems serve more than 19 million active and retired teachers, non-teaching personnel, and other public employees; and have combined assets of over \$2 trillion in their trust funds.

More information about the conference is not yet available.

Fees

\$1,300
Registration opens in July 2019.

Contact

Robyn Wheeler
Phone: (916) 509-7260

Email

rwheeler@nctr.org

Link: <https://nctr.org/upcoming-events/conference/>

Conference: ICGN Miami Conference

Start Date: October 15, 2019

Organizer: International Corporate Governance Network (ICGN) - Hosted by

End Date: October 16, 2019

Location: Miami, Florida

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

Topic Area: Corporate Governance

Attendance: Members Only

This conference will be hosted by the Florida State Board of Administration (SBA). The State of Florida has been a long-standing advocate for good corporate governance and has pursued this in a variety of mediums. They are among the most active of the state pension plans in the US corporate governance arena. Investors around the world benefit from such active and engaged owners. This conference aims to help keep attendees informed of the latest corporate governance developments, by providing best practice guidance, updates from policy makers and insights from leading speakers in both industry and academia, in a format that maximises networking opportunities with the senior professionals in attendance.

See the website for more information about the conference.

Fees

£600 - non-members
£550 - CII members
£500 - ICGN members

Contact

Elle Thomas
Head of Communications &
Events
Phone: +44 (0) 207 612 7011

Email

elizabeth.thomas@icgn.org

Link: <https://www.icgn.org/events/icgn-miami-conference>

Conference: Managing Pension Risk & Liabilities

Start Date: October 15, 2019

Organizer: Pensions & Investments

End Date: October 16, 2019

Location: Austin, Texas

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

Topic Area: Investments

Attendance: By Invitation Only

Pension risk management has become very complicated over the past several years with the changing economic and regulatory environments, and an array of strategies from which to choose. This conference will provide actionable information for developing, implementing and managing pension risk no matter the strategy chosen.

Fees

Not yet available.
Please contact conference organizer.

Contact

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

Email

pi-registration@pionline.com

Link: <https://conferences.pionline.com/conference/pension-risk/2019>

Conference: Annual Institutional Investor Real Estate Conference

Start Date: October 16, 2019

Organizer: Pension Real Estate Association (PREA)

End Date: October 18, 2019

Location: Washington, District of Columbia

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

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.
Last year's fees:
\$415 - non-member
\$110 - member

Contact

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

Email

amy@prea.org

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

Conference: Talent Acquisition Conference

Start Date: October 17, 2019

Organizer: The Conference Board

End Date: October 18, 2019

Location: New York, New York

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

Topic Area: Human Resources

Attendance: Open To All

The theme for this conference is: "A Focus on Your Future Workforce". The TA function is evolving with new technologies, new organizational structures, and new sourcing strategies. How will your organization focus on the future workforce? This conference will explore strategies and innovations you should consider and implement now in order to stay ahead of your competitors in the next decade.

See the website for more information about the conference.

Fees

\$2,895 - non-members
\$2,395 - members
\$400 discount for registration by August 10, 2019.

Contact

Phone: +1 212 339 0345
Fax: +1 212 836 9740

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=3028>

Conference: Fixed Income Management

Start Date: October 17, 2019

Organizer: CFA Institute - Hosted with the CFA Society Boston

End Date: October 18, 2019

Location: Boston, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

At this conference, leading practitioners and researchers will navigate what is happening in global bond markets, take a closer look at the path to interest rate normalization, and discuss prospects for economic growth in developed and emerging economies. Covering practical topics that address fixed-income sectors, security selection, and portfolio construction, the conference brings together top researchers, strategists, analysts, and portfolio managers focused on uncovering investment ideas and strategies that can be used to successfully meet client objectives. Discover where discerning investors are finding opportunities in fixed-income markets for diversification, value, and protection against uncertainty.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fee:
\$1,595 - non-members
\$1,295 - CFA members
Registration opens May 2019.

Contact

Phone: (434) 951-5499
Toll-free: 1 (800) 247-8132
Fax: (434) 951-5262

Email

ceprogram@cfainstitute.org

Link: <https://www.cfainstitute.org/en/events/conferences/fixed-income-2019>

Conference: Annual Conference

Start Date: October 19, 2019

Organizer: National Pension Education Association (NPEA)

End Date: October 23, 2019

Location: Naples, Florida

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

Topic Area: Pension Plan Policy

Attendance: Members Only

The NPEA is a national organization of public retirement systems that focuses on comprehensive retirement education for members of these systems. It provides a forum to educate public retirement system professionals and encourage the ongoing exchange of information and ideas in retirement planning and member communication. NPEA's goal is to assist public retirement system professionals with resources to anticipate the needs of their members as they plan a retirement that is emotionally, financially and socially satisfying.

See the website for more information about the conference.

Fees

Not yet available.
Last year's fee: \$750

Contact

Aimee Rives, Administrator
Phone: 859-492-1693

Email

aimee.rives@gmail.com

Link: <http://npea.com/2019-annual-conference>

Conference: Annual Conference

Start Date: October 20, 2019

Organizer: Public Pension Financial Forum (P2F2)

End Date: October 23, 2019

Location: Salt Lake City, Utah

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

Topic Area: Operations

Attendance: Open To All

The Public Pension Financial Forum is organized for education, pension advocacy and networking purposes for public pension plans. To support the ongoing education of its membership, it prepares quarterly newsletters, holds member facilitated conference calls and hosts an annual conference at a North American location.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fees: \$500
\$100 discount for early registration

Contact

Phone: 614-227-0059

Email

information@p2f2.org

Link: <https://www.p2f2.org/annualconference>

Conference: Annual Conference

Start Date: October 20, 2019

Organizer: American Society of Pension Professionals & Actuaries (ASPPA)

End Date: October 23, 2019

Location: National Harbor, Maryland

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

Topic Area: General

Attendance: Open To All

ASPPA is a non-profit professional organization with two major goals: to educate retirement plan professionals, and to create a framework of public policy that gives every working American the ability to have a comfortable retirement. In pursuit of these goals, ASPPA offers its more than 7,000 members extensive educational opportunities, paired with a strong advocacy operation. While ASPPA began in 1966 as an actuarial organization, they have changed to reflect the shifts in the retirement plan industry. As a result, ASPPA now represents business owners, actuaries, TPAS, record keepers, consultants and more.

More information about the conference is not yet available.

Fees

Last year's fees:
 \$1,715 - non-members
 \$1,410 - members
 \$300 discount for early registration

Contact

Phone: 703.516.9300
 Fax: 703.516.9308

Email

customercare@asppa-net.org

Link: <http://asppaannual.org/>

Course: Investment Strategies and Portfolio Management

Start Date: October 21, 2019

Organizer: The Wharton School, University of Pennsylvania

End Date: October 25, 2019

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) June 3-7, 2019, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program provides a solid understanding of today's investment landscape and the tools and theories for developing and measuring the performance of portfolios. It provides actionable theories and practical tools for addressing asset allocation, risk management, performance measurement, and investment policies. It explores individual asset classes, including bonds, hedge funds, private equity, derivatives, real estate, and international markets to help participants better understand when to include these investments in their portfolios. Session topics include:

- Modern Portfolio Theory
 - Performance Measurement
 - Evaluating Managers and Strategies
 - Advanced Asset Allocation
 - Investment Policy
 - Outlook for the Economy and Navigating Its Risk
- See the website for more information about the program.

Fees

\$10,950
 Fee includes lodging and most 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/investment-strategies-and-portfolio-management>

The recent: World Pension Summit

Start Date: October 22, 2019

Organizer: Pensions & Investments

End Date: October 24, 2019

Location: The Hague, Netherlands

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

Topic Area: Pension Plan Policy

Attendance: Open To All

This summit will focus on 'Shifting Powers + Sustainable Investment: Separating the signal from the noise'. Both in plenary sessions and dedicated tracks of choice we discuss the long-term components of vital 'pension cross-roads'. This program covers all aspects of pensions, integrated at a senior – in depth – level.

See the website for more information about the conference.

Fees

€1,995

Contact

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

Email

pi-registration@pionline.com

Link: <https://conferences.pionline.com/conference/WPS/2019>

Conference: Global Investment Forum

Start Date: October 22, 2019

Organizer: Mercer

End Date: October 23, 2019

Location: Boston, Massachusetts

Alternative Date(s) & Location(s) June 20-21, 2019, Toronto ON
Sept. 3-4, 2019, Dublin, Ireland

Topic Area: Investments

Attendance: By Invitation Only

The 2019 Forum highlights the potential of unrewarded risks present in the market and also looks at how global economies and market participants' behavior in the 10 years since the financial crisis have changed and are impacting markets and creating opportunities. It will develop these themes alongside general and investor-specific risks inherent in the current investment environment, but also the opportunities that exist to help position portfolios for the short term and into the future. It will also highlight the ever-growing trend toward sustainable investing, which is now becoming standard.

See the website for more information about the conference.

Fees

No charge for Mercer clients. Others should contact the conference organizer.

Contact

Allison Vitale
Phone: +1 201 744 1758

Email

allison.vitale@mercer.com

Link: <http://www.mercersignatureevents.com/investmentforums/2018/chicago/index.shtml>

Course: Real Estate as an Asset and Business

Start Date: October 23, 2019

Organizer: Columbia Business School

End Date: October 25, 2019

Location: New York, New York

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

Topic Area: Investments

Attendance: Open To All

This program provides participants with a deep understanding of real estate valuation and investments — sharpening their acumen of real estate principles, teaching them how to mitigate risk in real estate investing, and strengthening their strategic decision-making capabilities in the field.

The program also introduces participants to businesses and strategies that disrupt and improve the way they buy, rent, sell, and manage real estate assets, including investment in disruptive real estate technologies and applications — insights that will help participants make better real estate investment decisions for the future. While touching on residential housing, the three-day program primarily focuses on the acquisition and management of income-producing commercial properties.

See the website for more information about the program.

Fees

\$6,450

Contact

Alberto O. Cruz
Associate Director, Learning
Solutions
+1 212-854-6037

Email

ac2508@gsb.columbia.edu

Link: <https://www8.gsb.columbia.edu/execed/program-pages/details/2595/REAB>

Conference: Executive Compensation Conference

Start Date: October 24, 2019

Organizer: The Conference Board

End Date: October 25, 2019

Location: New York, New York

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

Topic Area: Human Resources

Attendance: Open To All

This conference will address how the executive compensation environment continues to change due to emerging best practices, the Tax Cuts and Jobs Act (162m), compensation design trends, impact of the Pay Ratio disclosure, reducing pay design complexity, pay disparity and more.

Other topics include:

- Selecting short, medium and long-term performance metrics
- Global issues in executive compensation
- Board of Directors compensation issues

See the website for more information about the conference.

Fees

\$2,895 - non-members
\$2,395 - members
\$400 discount for registration by
August 17, 2019.

Contact

Phone: +1 212 339 0345
Fax: +1 212 836 9740

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=3031>

Conference: Trustees' Roundtable

Start Date: October 25, 2019

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: October 25, 2019

Location: Oakland, California

Alternative Date(s) & Location(s) June 7, 2019, Glendale CA

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.

More information about the conference is available exclusively to CALAPRS member systems and sponsors. Please visit the website to 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/events/EventDetails.aspx?id=1202792&group=>

Conference: Accredited Fiduciary (NAF) Program

Start Date: October 26, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 27, 2019

Location: New Orleans, Louisiana

Alternative Date(s) & Location(s) May 18-19, 2019, Austin TX

Topic Area: Board Governance & Leadership

Attendance: Members Only

This is an accreditation program specifically designed and tailored for public pension governance. It divides plan governance, oversight and administration into four modules. Each module delves into the fundamental components and strategies necessary for governing a public pension fund, allowing trustees and plan staff to walk away with the key competencies critical to their fiduciary responsibilities. Offered two modules at a time, upon completion of all four modules (in any order), participants will earn their Accredited Fiduciary (AF) designation. It is recommended that participants complete the Trustee Educational Seminar first.

- Module 1 – Governance and the Board's Role
- Module 2 – Investment and Finance
- Module 3 – Legal, Risk Management and Communication
- Module 4 – Human Capital

See the website for more information about the program.

Fees

Not yet available:
May 18-19, 2019 fees: \$1,020 - for two modules
\$205 discount for registration by April 15, 2019.

Contact

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

Email

registration@ncpers.org

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

Conference: Public Safety Conference

Start Date: October 27, 2019

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 30, 2019

Location: New Orleans, Louisiana

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

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

Not yet available.
Last year's fees: \$800
\$100 discount for early registration

Contact

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

Email

registration@ncpers.org

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

Conference: Discussion Forum

Start Date: October 27, 2019

Organizer: International Centre for Pension Management (ICPM)

End Date: October 29, 2019

Location: Sydney, Australia

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

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.

More information about the forum is not yet available.

Fees

Not available. Please contact the conference organizer.

Contact

Karen Clarke
Phone: 416.925.4153
Fax: 416.925.7377

Email

kclarke@icpmnetwork.com

Link: <http://www.icpmnetwork.com/icpm-discussion-forum-fall-2018-chile/>

Course: Behavioral Finance

Start Date: October 28, 2019

Organizer: Amsterdam Institute of Finance – Approved by the CFA Institute

End Date: October 30, 2019

Location: Amsterdam, Netherlands

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

Topic Area: Investments

Attendance: Open To All

This program is intended provide a structural framework for analyzing how human, social, cognitive and emotional factors impact financial and strategic decisions and the way they are quantified. The goal is to make participants aware of the different biases and to quantify their relevance in the decision making process. You will:

- Gain an understanding of the major behavioral biases and see their impact on strategic planning as well as financial behavior, decision making and performance
- Analyze how psychological phenomena impact the competitive landscape and markets
- Understand how managers, corporate and private customers, as well as institutions think
- Reduce your vulnerabilities to making suboptimal judgments and inferior financial decisions
- Learn how to apply behavioral tools to strategic planning, investment and financial decisions
- Learn about potential pitfalls of traditional valuation frameworks and how to properly account for the “hidden components” of financial and planning decisions
- Develop a framework that leads managerial decisions both at the individual and team level, resulting in a high performance team.

See the website for more information about the program.

Fees

€3,600

Contact

Phone: +31 (0)20 520 0160

Fax: +31 (0)20 520 0161

Email

info@aif.nl

Link: <https://www.aif.nl/program/behavioral-finance/>

The recent: West Coast Defined Contribution Conference

Start Date: November 03, 2019

Organizer: Pensions & Investments

End Date: November 05, 2019

Location: San Diego, California

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

Topic Area: DC Plans

Attendance: Open To All

As plan sponsors navigate an array of investment and fiduciary decisions to help maximize retirement outcomes for their participants, they need access to prudent, workable solutions and best practices by trusted experts. This conference delivers:

- Practical and implementable insights from fellow plan executives
- Peer-to-peer networking with 401(k), 403(b) and 457 plan managers
- Investment, fiduciary, administration and communication approaches — what’s working now and what’s coming down the pike

More information about the conference is not yet available.

Fees

Not yet available.

Contact

Elayne Glick, Audience

Development Director

Phone: (212) 210-0247

Email

pi-registration@pionline.com

Link: https://www.pionline.com/conferences?event_type=conference

Conference: Executive Seminar
Organizer: Pacific Pension Institute
Location: Hangzhou, China

Start Date: November 03, 2019
End Date: November 05, 2019
Alternative Date(s) N/A & Location(s)

Topic Area: Economics

Attendance: Members Only

Pacific Pension & Investment Institute (PPI) convenes global pension and investment thought leaders for in-depth dialogue and knowledge sharing on issues facing long-term institutional investors in Asia and the Pacific Rim. PPI is a global organization with individual and institutional members from leading pension funds, sovereign wealth funds, endowments, foundations, commercial asset management and other investment experts.

More information about the seminar is not yet available.

Fees
 Not available.
 Please contact conference organizer.

Contact
 Phone: +1 (415) 576-1187
 Fax: +1 (415) 576-1189

Email
 info@ppi.institute

Link: <https://www.ppi.institute/programs/>

Course: Private Equity: Investing and Creating Value
Organizer: The Wharton School, University of Pennsylvania
Location: Philadelphia, Pennsylvania

Start Date: November 04, 2019
End Date: November 08, 2019
Alternative Date(s) N/A & Location(s)

Topic Area: Investments

Attendance: Open To All

This program is designed for institutional investors as well as investment professionals aspiring to be better private equity managers. It will deliver the latest information about the private equity sector, while teaching the concepts investors need to know to evaluate investment opportunities in the private equity space. Session topics include:

- Fund Structure
- Leveraged Buyout Model and Comparables Analysis
- Deal Origination, Transaction, and Execution
- Value Creation With Operations and Negotiation
- Advanced And Best Practices In Private Equity
- Commercial Due Diligence
- The Limited Partners' Perspective
- Growth Equity
- Middle Market Private Equity
- Private Equity In Emerging Economies

See the website for more information about the program.

Fees
 \$10,950
 Fee includes lodging 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: Succession Management Conference

Start Date: November 05, 2019

Organizer: The Conference Board

End Date: November 06, 2019

Location: New York, New York

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

Topic Area: Human Resources

Attendance: Open To All

This conference will focus on practical ways to execute succession planning in today's complex environment to meet tomorrow's business needs, ultimately elevating your organization's ability to achieve integrated succession practices that deliver superior results. The emphasis this year will be on leveraging the complexity in our businesses to create a stronger talent bench. You will discover new and innovative approaches to succession planning, coupled with meaningful ways to bring them to life.

See the website for more information about the conference.

Fees

\$2,895 - non-members
\$2,395 - members
\$400 discount for registration by August 24, 2019.

Contact

Phone: +1 212 339 0345
Fax: +1 212 836 9740

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=3030>

Conference: Asia Pacific Roundtable

Start Date: November 06, 2019

Organizer: Pacific Pension Institute

End Date: November 08, 2019

Location: Shanghai, China

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

Topic Area: Economics

Attendance: Members Only

Pacific Pension & Investment Institute (PPI) convenes global pension and investment thought leaders for in-depth dialogue and knowledge sharing on issues facing long-term institutional investors in Asia and the Pacific Rim. PPI is a global organization with individual and institutional members from leading pension funds, sovereign wealth funds, endowments, foundations, commercial asset management and other investment experts.

The roundtables provide members a unique opportunity to explore issues related to long-term investment. Limited to roughly 120 senior executives from the institutional investor community, these programs offer a forum for honest and confidential discussions on important themes and trends that affect asset allocation, risk management, and investment decisions

More information about the conference is not yet available.

Fees

Not available.
Please contact conference organizer.

Contact

Phone: +1 (415) 576-1187
Fax: +1 (415) 576-1189

Email

info@ppi.institute

Link: <https://www.ppi.institute/programs/>

Conference: Defined Contribution Institute

Start Date: November 07, 2019

Organizer: Institutional Investor

End Date: November 08, 2019

Location: Boston, Massachusetts

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

Topic Area: DC Plans

Attendance: By Invitation Only

The Institutional Investor DC Institute is a private membership organization for DC plan sponsors as well as the industry's leading asset management firms, providers, and consultants. Members come together for meetings which foster idea exchange and the achievement of common goals. The environment at these events is collegial, collaborative and confidential in accordance with Chatham House Rules. The agenda for each DC Institute meeting draws heavily on an incomparable well of industry insight contributed by our plan sponsor and expert attendees. Each program addresses the issues most relevant to the nation's plans.

More information about the conference is not yet available.

Fees

No fee. Limited to "qualified" DC plan sponsors. Please contact the conference organizer to register.

Contact

Madeline Heckman
Phone: (212) 224-3640
Fax: (212) 224-3802

Email

madeline.heckman@institutionalinvestor.com

Link: <https://www.iiconferences.com/DC-Institute/Defined-Contribution-Institute-Boston>

Course: Fixed Income Investment

Start Date: November 11, 2019

Organizer: Amsterdam Institute of Finance – Approved by the CFA Institute

End Date: November 13, 2019

Location: Amsterdam, Netherlands

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

Topic Area: Investments

Attendance: Open To All

This course provides a practical overview of the fixed income markets, with focus on the management of bond portfolios. You will:

- Increase your understanding of the different types of risk faced by bond portfolio managers
- Learn about measures of risk such as duration and convexity as well as more advanced measures
- Review fixed-income derivatives, futures, options and swaps and understand their usefulness in bond portfolio management for hedging or speculating

See the website for more information about the program

Fees

€3,600

Contact

Phone: +31 (0)20 520 0160
Fax: +31 (0)20 520 0161

Email

info@aif.nl

Link: <https://www.aif.nl/program/fixed-income-investment/>

Conference: Multi-Asset Investing
Organizer: Pensions & Investments
Location: Chicago, Illinois

Start Date: November 12, 2019
End Date: November 12, 2019
Alternative Date(s) & Location(s): November 14, 2019, New York NY

Topic Area: Investments

Attendance: Open To All

Innovations in Outcome Oriented Investing: This conference will provide a platform for discussion and debate regarding why asset owners should consider a multi-asset approach, the various drivers behind them and how to utilize this strategy to maximize overall performance.

More information about the conference is not yet available.

Fees
 Not yet available.

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

Email
 pi-registration@pionline.com

Link: https://www.pionline.com/conferences?event_type=conference

Conference: Fall Conference
Organizer: State Association of County Retirement Systems (SACRS)
Location: Monterey, California

Start Date: November 12, 2019
End Date: November 15, 2019
Alternative Date(s) & Location(s): N/A

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.

More information about the conference is not yet available.

Fees
 Not yet available.
 Last year's fees: \$120 - system and other non-profit member
 \$2,670 - non-member

Contact
 Phone: 916-441-1850
 Fax: 916-441-6178

Email
 sacrs@sacrs.org

Link: <https://sacrs.org/events/fall-conference/>

Course: Investment Decisions and Behavioral Finance

Start Date: November 13, 2019

Organizer: Harvard Kennedy School

End Date: November 15, 2019

Location: Cambridge, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

Common biases. Irrational investment behaviors. Decision-trap situations. In today's ever-changing and complex financial markets, senior executives responsible for managing client assets need to understand the factors that produce sub-optimal outcomes for investors.

This course presents a revolutionary science for investment decision making— behavioral finance. It will discuss the central principles and latest findings of the psychology of decision making under conditions of risk and uncertainty, with a focus on practical applications for those responsible for managing assets and constructing portfolios.

See the website for more information about the program.

Fees

\$5,300
Includes tuition, materials and most meals, but not housing.
Application deadline:
October 16, 2019.

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

Link: <https://www.hks.harvard.edu/educational-programs/executive-education/investment-decisions-and-behavioral-finance>

Conference: Multi-Asset Investing

Start Date: November 14, 2019

Organizer: Pensions & Investments

End Date: November 14, 2019

Location: New York, New York

Alternative Date(s) & Location(s) November 12, 2019, Chicago IL

Topic Area: Investments

Attendance: Open To All

Innovations in Outcome Oriented Investing: This conference will provide a platform for discussion and debate regarding why asset owners should consider a multi-asset approach, the various drivers behind them and how to utilize this strategy to maximize overall performance.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

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

Email

pi-registration@pionline.com

Link: https://www.pionline.com/conferences?event_type=conference

Conference: Equity Research and Valuation

Start Date: November 14, 2019

Organizer: CFA Institute - Hosted with the CFA Society New York

End Date: November 15, 2019

Location: New York, New York

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

Topic Area: Investments

Attendance: Open To All

This conference aims to keep investment managers abreast of the latest advances and developments in equity research techniques, valuation, and portfolio management. The application of new technologies in portfolio management will be a key theme for the conference, and speakers will discuss such topics as the use of artificial intelligence, data analytics, and quantitative techniques in investment decision making and how blockchain could disrupt a number of industries, including financial services. Topics for discussion will include valuation approaches and analysis, global investment strategies, research methods, how to better understand and analyze portfolio risks, and the top challenges equity investors face today.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fee:
\$1,295 - non-members
\$1,095 - CFA members

Contact

Phone: (434) 951-5499
Toll-free: 1 (800) 247-8132
Fax: (434) 951-5262

Email

ceprogram@cfainstitute.org

Link: <https://www.cfainstitute.org/en/events/conferences/equity-2019>

Conference: Global East Government Funds Roundtable

Start Date: November 20, 2019

Organizer: Institutional Investor

End Date: November 22, 2019

Location: Singapore, Singapore

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

Topic Area: Investments

Attendance: By Invitation Only

The roundtable gathers the heads of investment from sovereign wealth funds, government pension plans and central bank reserve management funds from across the Asia-Pacific region to discuss the latest approaches to current investment challenges as well as complex governance issues.

More information about the conference is not yet available.

Fees

Not available. Please contact the conference organizer.

Contact

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Director, Programming
Phone: +1 212 224 3609

Email

ewhittingham@institutionalinvestor.com

Link: <https://www.iiconferences.com/Sovereign-Investor-Institute/2019-Global-East-Government-Funds-Roundtable>

Course: High Performance Boards

Start Date: November 25, 2019

Organizer: IMD Business School

End Date: November 28, 2019

Location: Lausanne, Switzerland

Alternative Date(s) & Location(s) May 6-9, 2019, Lausanne
June 17-20, 2019, Lausanne
Sep 30-Oct 3, 2019, Lausanne

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is for supervisory board members and chairpersons. It is designed to prepare your board to face the challenges of a complex world.

Specifically the program will help you:

- Identify what makes best practice boards
- Drive positive board culture
- Evaluate and mitigate risk and maximize opportunities through strategic board involvement
- Ensure successful succession plans
- Learn how to manage a board in crisis

See the website for more information about the program.

Fees

CHF 11,500

Contact

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

Email

N/A

Link: <http://www.imd.org/hpb/board-governance/>

Course: Understanding Global Macroeconomics

Start Date: November 25, 2019

Organizer: Amsterdam Institute of Finance – Approved by the CFA Institute

End Date: November 26, 2019

Location: Amsterdam, Netherlands

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

Topic Area: Investments

Attendance: Open To All

This course is a brief refresher program in macroeconomics, with a strong emphasis on international and financial applications. First, it develops/reviews simple models of the goods and services, asset, capital, and labor markets, to be able to generate realistic predictions about the behavior of macroeconomic variables such as output, employment, inflation, the trade balance, and interest and exchange rates. At the same time, it applies these models to understand and interpret current and historical macroeconomic developments. There is a particular emphasis on understanding contemporary issues of global significance such as the consequences of Brexit, the impact of Trump, the Global Financial Crisis of 2008-09 and subsequent Euro crisis, and the Asian growth slowdown.

See the website for more information about the program.

Fees

€2,500

Contact

Phone: +31 (0)20 520 0160
Fax: +31 (0)20 520 0161

Email

info@aif.nl

Link: <https://www.aif.nl/program/macroeconomics-global-financial-markets/>

Conference: Global Stewardship Forum

Start Date: November 26, 2019

Organizer: International Corporate Governance Network (ICGN)

End Date: November 26, 2019

Location: London, UK

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

Topic Area: Corporate Governance

Attendance: Open To All

Stewardship is a shared responsibility for companies and investors alike in their pursuit to preserve and enhance the long-term value of companies. ICGN's first statement on investor stewardship, published in 2003, extends stewardship responsibilities beyond the activities of monitoring, voting and engagement to address the internal governance arrangements of investor themselves. Today stewardship concepts are enshrined in national codes around the world and in regional regulation, most notably the EU Shareholder Rights Directive. This Forum will address the how these codes and rules are being implemented in practice, what 'best in class' looks like and how to enhance the quality of stewardship disclosures.

See the website for more information about the conference.

Fees

£350 - non-member
£250 - member

Contact

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Email

elizabeth.thomas@icgn.org

Link: <https://www.icgn.org/events/icgn-2019-global-stewardship-forum>

Course: Advanced Asset Management

Start Date: December 02, 2019

Organizer: INSEAD - Approved by the CFA Institute

End Date: December 06, 2019

Location: Fontainebleau, Switzerland

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

Topic Area: Investments

Attendance: Open To All

This program has been designed to provide an in-depth understanding of the major trends and issues in asset management today. Participants will be encouraged to broaden their thinking as they explore modern ideas, detailed techniques of asset management and portfolio selection. The aim is to break through the very narrow and specific set of skills used in day-to-day management to gain a better understanding of the new trends and issues in finance.

See the website for more information about the program.

Fees

€ 8,500 + VAT

Contact

Phone: +33 (0)1 60 72 40 38

Email

AAM_Contact@insead.edu

Link: <https://www.insead.edu/executive-education/finance/advanced-asset-management>

Course: Project and Infrastructure Finance

Start Date: December 02, 2019

Organizer: London Business School

End Date: December 06, 2019

Location: London, UK

Alternative Date(s) & Location(s) June 10-14, 2019, London, UK

Topic Area: Investments

Attendance: Open To All

This program will provide you with the practical skills and expertise to manage the process of valuing, financing and structuring project and infrastructure finance deals. You will study the project and infrastructure finance process from start to finish and gain a thorough understanding of how it works by: analyzing international case studies, collaborating with fellow participants and developing a deeper understanding of global dynamics.

You will learn about:

- Creating value through project and infrastructure finance
- Project versus corporate finance
- Financing, valuing and structuring large- scale infrastructure projects
- Analyzing project risks and rewards
- Optimally restructuring projects in distress
- Public-private Partnerships (PPP) and private finance initiatives (PFI)
- Project finance in emerging markets.

See the website for more information about the program.

Fees

£7,500

Contact

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finance@london.edu

Link: <https://www.london.edu/executive-education/finance/project-and-infrastructure-finance?display=expanded>

Course: Value Investing

Start Date: December 03, 2019

Organizer: Columbia Business School

End Date: December 05, 2019

Location: New York, New York

Alternative Date(s) & Location(s) June 4-6, 2019, New York NY

Topic Area: Investments

Attendance: Open To All

Based on the Ben Graham or Warren Buffett approach to allocating capital, this exclusive program will teach the frameworks and processes of investing that some of the most successful investors in the world employ to manage and preserve capital.

You will learn to use quantitative valuation techniques, such as arbitrage, asset-based approaches and the earning power method, and you will effectively combine those tools with strategic methodologies for estimating franchise value. Three real-world case studies enable more precise estimation of investment risk and improve your ability to manage a value portfolio.

See the website for more information about the program.

Fees

\$7,500

Contact

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Link: <https://www8.gsb.columbia.edu/execed/program-pages/details/61/V1?sourceid=finder>

Conference: RI Americas

Start Date: December 04, 2019

Organizer: Responsible Investor

End Date: December 05, 2019

Location: New York, New York

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

Topic Area: Investments

Attendance: Open To All

This conference provides a unique opportunity to learn, share and debate on responsible investment issues with 500+ 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.

More information about the conference is not yet available.

Fees

No charge for asset owner and investment consultants.

Contact

Hamish Stewart
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Email

hamish@responsible-investor.com

Link: https://www.responsible-investor.com/events/events_page/ri_americas_2019/

Conference: Investing for Good USA

Start Date: December 05, 2019

Organizer: Financial Times (FT)

End Date: December 05, 2019

Location: New York, New York

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

Topic Area: Investments

Attendance: Open To All

As increasing numbers of individuals, foundations and institutions look to make investments that are focused on positive impact while generating a financial return, a growing number of funds and investors are looking to the United Nation's Sustainable Development Goals (SDGs) as a framework for their investments. Given that, by some estimates, \$3-\$5 trillion annually will be needed to meet the goals, capital markets have a key role to play. But while there is much talk in the investment community about the SDGs, what will it take to turn enthusiasm into action, enabling greater financial flows to be directed towards the goals?

The theme for this conference is: Mobilising Private Capital to Meet the SDGs. Institutional investors, wealth managers, foundations, government, family offices, social entrepreneurs and others will discuss how innovative finance could support meeting the SDGs while also providing a financial return.

See the website for more information about the conference.

Fees

Not yet available.

Contact

Phone: +44 (0)20 7775 6653

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Link: <https://live.ft.com/Events/2019/FT-Investing-for-Good-USA>

Course: Venture Capital

Start Date: December 08, 2019

Organizer: The Wharton School, University of Pennsylvania

End Date: December 12, 2019

Location: San Francisco, California

Alternative Date(s) & Location(s) May 6-10, 2019, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program will discuss how VC funds are organized, how investments are selected, and how due diligence is conducted. It will examine case studies that detail a transaction from beginning to end. Participants will see how a deal is structured, learn more about the differing incentives of a VC fund and entrepreneurs, and gain a deeper understanding of venture investing. Session topics may include:

- Limited Partner/General Partner Negotiation and Contracting
- The VC Business Model: Sourcing, Screening, and Selection
- Venture Capital Valuation Method
- Term Sheets: The Venture Capitalist's and Entrepreneur's perspectives
- Deal Sourcing
- Managing Innovative Processes
- Later-Round Financing
- Preferred Stock Valuation
- Exit Strategies

See the website for more information about the program.

Fees

\$10,950
Fee includes meals but not accommodations.

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Course: Leading from the Chair

Start Date: December 11, 2019

Organizer: INSEAD

End Date: December 13, 2019

Location: Fontainebleau, Switzerland

Alternative Date(s) & Location(s) June 10-12, 2019, Fontainebleau, Switzerland

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program provides board chairs with the opportunity to discover, share and practice techniques for achieving higher levels of board effectiveness. From setting direction and shaping strategy to acting as the pivot between the board, CEO and external stakeholders, the demands and challenges facing chairs are ever-increasing. In this context, the need for an exceptional chair has never been more crucial in board effectiveness and influencing organizational performance and direction. This program is designed to sharpen your skills for leading an effective and high-performing board, which can effectively set and implement the company's direction and strategy.

See the website for more information about the program.

Fees

€ 7,250 + VAT

Contact

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Email

LC_Contact@insead.edu

Link: <https://www.insead.edu/executive-education/corporate-governance/leading-from-the-chair>

Conference: Legislative Conference

Start Date: January 26, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: January 28, 2020

Location: Washington, District of Columbia

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

Topic Area: Pension Plan Policy

Attendance: Members Only

This is a conference for public fund trustees and plan administrators, highlighting the issues on Capitol Hill and in federal regulatory agencies that affect pension funds today. Past conferences have brought senior administration officials, Members of Congress and Washington insiders to help educate fund members on the critical issues affecting public pensions and equip them with the tools needed to deal with these issues effectively and meet-face-to-face with their elected leaders on the Hill.

More information about the conference is not yet available.

Fees

Not yet available.
2019 fees: \$600

Contact

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Email

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Link: <http://www.ncpers.org/legislative>

Conference: PREA Spring Conference

Start Date: March 04, 2020

Organizer: Pension Real Estate Association (PREA)

End Date: March 05, 2020

Location: Beverly Hills, California

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

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 conference.

Fees

Not yet available.
Last year's fee:
\$525 - non-member
\$150 - member

Contact

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Fax: 860-692-6351

Email

amy@prea.org

Link: <http://spring2019.prea.org/>

Course: Private Equity and Venture Capital

Start Date: March 04, 2020

Organizer: Harvard Business School, Harvard University

End Date: March 07, 2020

Location: Cambridge, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

This program provides the frameworks you need to improve your firm's effectiveness at every stage of a deal. By examining critical issues related to industry infrastructure, portfolio management, and negotiation strategies, you will be well equipped to overcome emerging investment challenges, find new paths to growth, and increase returns on capital. By exploring the multifaceted issues that investors face over the course of numerous market cycles, this program raises your level of investment expertise. As you examine the full range of industry models—from venture capital to growth equity to buyouts—you will learn how to build more effective investment strategies for your firm and adapt your approach to rapidly changing conditions.

See the website for more information about the program.

Fees

Not yet available.
Last year's fee: \$10,000
Covers tuition, books,
accommodation & most meals

Contact

Phone: +1-617-495-6555
Toll-free: 1-800-427-5577

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/private-equity-venture-capital/>

Course: Impact Investing Program

Start Date: March 16, 2020

Organizer: Said Business School, Oxford University

End Date: March 20, 2020

Location: Oxford, UK

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

Topic Area: Investments

Attendance: Open To All

Impact investing focuses on developing business solutions to the world's most pressing social problems. This program provides an opportunity to develop a deep and broad understanding of the impact investment sector and understand how to make more targeted investment decisions.

You will learn how to:

- work effectively as an impact investment practitioner
- develop an effective strategy and plan
- measure and assess your impact

See the website for more information about the program.

Fees

£6,000

Contact

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Link: <https://www.sbs.ox.ac.uk/programmes/oxford-impact-investing-programme>

Course: Real Estate Program

Start Date: March 23, 2020

Organizer: Said Business School, Oxford University

End Date: March 27, 2020

Location: Oxford, UK

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

Topic Area: Investments

Attendance: Open To All

Real estate makes up around 50% of the world's assets and it is crucial to the success of global economies and societies. In the turbulent global financial markets, an understanding of real estate is vital for senior executives, investors and policy makers worldwide.

Participants in this program:

- review the latest developments, opportunities and risks in real estate investments
- gain an understanding of real estate user and capital markets
- analyse technology, urbanisation, demographics, globalisation and macroeconomic trends
- design a business case for a real estate investment and present it to potential industry funders

See the [website](#) for more information about the program.

Fees

£7,000

Contact

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Link: <https://www.sbs.ox.ac.uk/programmes/oxford-real-estate-programme>

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