



CITY AND COUNTY OF SAN FRANCISCO
RETIREE HEALTH CARE TRUST FUND BOARD

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RETIREE HEALTH CARE TRUST FUND
BOARD CALENDAR SHEET
Board Meeting of November 27, 2017

TO: Retiree Health Care Trust Fund Board
FROM: Caryn Bortnick 
SFERS Deputy Executive Director
DATE: November 27, 2017

Agenda Item

Board Educational Opportunities

Background

Attached is the most recent Cortex Report listing upcoming educational opportunities.

Recommendation

This is a discussion item only. Please contact staff directly if you are interested in attending any of the listed educational programs.

Attachments

List of Education and Training Opportunities



The Cortex Report

Customized for the

San Francisco Employees' Retirement System

November 2017

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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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Jun 25, 2018	International Corporate Governance Network (ICGN)	Annual Conference	Milan	44 <i>New</i>
Jun 25, 2018	Saïd Business School, Oxford University- Approved by the CFA Institute	Private Equity Program	Oxford	45
Jun 25, 2018	Institutional Investor - Co-hosted by Kessler Topaz Meltzer & Check LLP	Evolving Fiduciary Obligations of Institutional Investors		45 <i>New</i>
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Oct 03, 2018	Pension Real Estate Association (PREA)	Annual Institutional Investor Real Estate Conference	Boston	48 <i>New</i>
Oct 06, 2018	National Council on Teacher Retirement (NCTR)	Annual Conference	Washington	48 <i>New</i>
Oct 16, 2018	London Business School	Masterclass in Private Equity	London	49 <i>New</i>
Oct 22, 2018	The Wharton School, University of Pennsylvania	Investment Strategies and Portfolio Management	Philadelphia	49 <i>New</i>
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Oct 22, 2018	IMD Business School	High Performance Boards	Lausanne	50 <i>New</i>

Event Listings

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Global Investment Forum

Start Date: November 02, 2017

Organizer: Mercer

End Date: November 02, 2017

Location: Vancouver, British Columbia, Canada

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

Topic Area: Investments

Attendance: Not Yet Available

Much has been written about the challenge of generating returns when yields and risk premia are relatively low. It is, however, just as important for investors to recognize the many sources of economic and political fragility in an environment in which we may be reaching the limits of monetary policy effectiveness. Investors are therefore compelled to consider a wide range of possible futures and to build portfolios that are likely to be resilient to a range of scenarios.

In response to this challenging set of circumstances, investors need to look both inward and outward. Looking inward, investors should seek to identify any characteristics of their approach, objectives or circumstances that might provide a competitive edge or raise the importance of certain categories of risk. Looking outward, investors can then seek to build a portfolio of assets and strategies that maximizes their specific advantages and improves the likelihood of meeting their long-term objectives while managing the risk of capital impairment.

Fees

No charge for Mercer clients.

Contact

Allison Grasso
Phone: +1 201 284 6205

Email

allison.grasso@mercer.com

Link: <http://www.mercersignatureevents.com/investmentforums/2017/vancouver/Index.shtml>

Conference: Executive Seminar

Start Date: November 05, 2017

Organizer: Pacific Pension Institute

End Date: November 07, 2017

Location: New Delhi, India

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

Topic Area: Economics

Attendance: Members Only

This seminar is being held in conjunction with the Asia Roundtable in Mumbai, India, from November 8-10, 2017. The theme for this seminar is "India as a Regional Power and Destination for Foreign Investment". Prime Minister Narendra Modi is entering his third year in office. His plans for economic growth have been ambitious, as they seek to remove hurdles to economic growth; encourage foreign investment; provide government and governance processes; encourage transparency; and invest in much-needed infrastructure. At the same time, as India continues to reform and accelerate its economic growth, its regional and global role will change. How has Modi's dream been realized?

See the conference website for more information.

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/#more-programs>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Defined Contribution Summit

Start Date: November 06, 2017

Organizer: Institutional Investor

End Date: November 07, 2017

Location: Boston, Massachusetts

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

Topic Area: DC Plans

Attendance: By Invitation Only

The theme for this conference is "DC Plans Are Improving, Why Aren't Many Employees' Prospects for a Financially Secure Retirement?"

The Institutional Investor Institute for Defined Contribution aim to take the next step forward in helping plan sponsors: supporting their decision making through inspiring and informative meetings, and creating a peer- focused community to help you continue the conversation beyond the days of the event. The Institute membership model is designed to put plan sponsors' needs first and foremost, with an agenda unconstrained by anything other than the mandate to provide a forum for the dissemination of the forward-most thought leadership and discussion of the ideas. The membership's mission is to help plan sponsors do their jobs so that they can better meet the needs of their participants.

See the website for more information and a detailed agenda.

Fees

No charge for corporate and public pension funds, endowments & foundations. Please contact the conference organizer to register.

Contact

Alisha Patel
Phone: (212) 224-3620
Fax: (212) 224-3802

Email

alisha.patel@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Institute-Defined-Contribution/Defined-Contribution-Summit>

Conference: Multi-Asset Investing Conference

Start Date: November 07, 2017

Organizer: Pensions & Investments

End Date: November 07, 2017

Location: Chicago, Illinois

Alternative Date(s) & Location(s) November 9, 2017, New York NY

Topic Area: Investments

Attendance: By Invitation Only

This conference designed to provide investment experts, institutional investors and consultants an intimate arena where they can learn how to generate returns, manage risk and minimize volatility through a single investment vehicle.

Multi-asset investing is an outcome-oriented solution, customized for the institution. It allows the institution to control their exposures while providing access to a global array of traditional and alternative assets. Dynamic management allows for quick adaption to changes in market conditions. While the principle of multi-asset investing is compelling, investors are still learning how best to implement this strategy. This conference is designed to provide the practical information that investors need to fully benefit from this approach.

See the website for more information and a detailed agenda.

Fees

No charge for plan sponsors and investment consultants.

Contact

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

Email

pi-registration@pionline.com

Link: <http://conferences.pionline.com/conference/multi-asset/2017>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Executive Compensation Conference

Start Date: November 07, 2017

Organizer: The Conference Board

End Date: November 08, 2017

Location: New York, New York

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

Topic Area: Human Resources

Attendance: Open To All

This conference review the outcome of the 2017 Proxy season, new approaches to pay-for-performance and a discussion on best practices. It will address new and emerging executive compensation trends during the 2017 Proxy season. The conference will discuss how companies are implementing SEC rules, improved incentive designs to ensure greater pay-for-performance alignment and much better communications as our investors and other stakeholders are demanding enhanced disclosures, as there is a major issue of public trust of compensation outcomes. Other topics include:

- Shareholder outreach and what investors want
- Selecting performance metrics for short, medium and long-term
- Global issues in executive compensation
- Board of Directors compensation issues

See the conference website for a detailed agenda.

Fees

\$2,895

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=2877>

Conference: Asia Roundtable

Start Date: November 08, 2017

Organizer: Pacific Pension Institute

End Date: November 10, 2017

Location: Mumbai, India

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

Topic Area: Economics

Attendance: Members Only

The roundtable is in partnership with the Securities and Exchange Board of India (SEBI) and the National Stock Exchange of India (NSE). The theme of the roundtable is: "Reforms, Development and Innovation: Fulfilling India's Growth Potential". India's metamorphosis since the 1990s has been nothing short of spectacular. At over two trillion dollars, India is now the seventh largest economy in the world, yet it still enjoys mid-to-high single-digit growth rates. Many Indian companies have become global players and made their owners billionaires. As the country commemorates its 70th year of independence, significant reforms are underway to promote growth, attract foreign investment and move up the value chain. While the years ahead look bright for a country populated by a young, educated workforce, how will India continue to provide incentives for further economic growth while bringing hundreds of millions of people out of poverty, minimizing corruption, and strengthening the rule of law? What are the implications for long-term investors and their investment strategies?

See the website for more information and a detailed agenda.

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/#next-program>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Fixed Income Investment

Start Date: November 08, 2017

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

End Date: November 10, 2017

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. By attending this program, 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 + VAT

Contact

Phone: +31 (0)20 520 0160

Fax: +31 (0)20 520 0161

Email

info@aif.nl

Link: <http://www.aif.nl/programs/open-enrollment-programs/fixed-income-investment.aspx?PID=59>

Conference: Succession Management Conference

Start Date: November 09, 2017

Organizer: The Conference Board

End Date: November 10, 2017

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 practices and processes that will take Succession Management into the future and enhance the partnership between HR and the business. There will be a prime emphasis on providing practical applications that can reduce complexity. Topics of discussion will include:

- Maximize the Power of Integrating Assessment and Development for Succession
- Learn about innovations in succession management practices
- Experience ways to overcome unconscious bias in talent review discussions
- Gain insight into the best practices in CEO candidate development
- Discover how three companies have selected and incorporated technology platforms into succession management
- Find out what it takes to embed a new succession management initiative (focus on critical roles) into your organizational culture
- Find out how a growth mindset changes leadership potential in an organization

See the website for more information and a detailed agenda.

Fees

\$2,895

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=2873>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: University of Virginia Investing Conference	Start Date: November 09, 2017
Organizer: Darden School of Business, University of Virginia - Approved by the CFA	End Date: November 10, 2017
Location: Charlottesville, Virginia	Alternative Date(s) & Location(s) N/A

Topic Area: Investments

Attendance: Open To All

This conference is hosted by the Richard A. Mayo Center for Asset Management. It will provide the insights of financial analysts, portfolio managers, economists, and industry executives and attracts professional investment managers, financial officers, academics, students, private investors and industry executives as they seek to identify and analyze the way forward. The conference will:

- Explore the current economic and political landscape and discuss the history of economic booms and market collapses
- Identify opportunities in a changing active-passive setting and explore alternative asset classes such as real estate and hedge funds
- Host the full Darden@Virginia Investing Challenge on Thursday afternoon, providing all registrants an opportunity to attend and observe live pitches and judges' questions.

See the website for more information.

Fees

\$275

Contact

Kristen Fisher
Operations Coordinator
Phone: +1-434-982-2915

Email

FisherK@darden.virginia.edu

Link: <http://www.darden.virginia.edu/mayo-center/events-programs/uvic/>

Conference: Multi-Asset Investing Conference	Start Date: November 09, 2017
Organizer: Pensions & Investments	End Date: November 09, 2017
Location: New York, New York	Alternative Date(s) & Location(s) November 7, 2017, Chicago IL

Topic Area: Investments

Attendance: By Invitation Only

This conference designed to provide investment experts, institutional investors and consultants an intimate arena where they can learn how to generate returns, manage risk and minimize volatility through a single investment vehicle.

Multi-asset investing is an outcome-oriented solution, customized for the institution. It allows the institution to control their exposures while providing access to a global array of traditional and alternative assets. Dynamic management allows for quick adaption to changes in market conditions. While the principle of multi-asset investing is compelling, investors are still learning how best to implement this strategy. This conference is designed to provide the practical information that investors need to fully benefit from this approach.

See the website for more information and a detailed agenda.

Fees

No charge for plan sponsors and investment consultants.

Contact

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

Email

pi-registration@pionline.com

Link: <http://conferences.pionline.com/conference/multi-asset/2017>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Fall Conference

Start Date: November 14, 2017

Organizer: State Association of County Retirement Systems (SACRS)

End Date: November 17, 2017

Location: San Francisco, 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. SACRS meets as an organization twice a year with all 20 counties participating through attendance by Trustees, Administrators, Treasurers and staff. Education and legislation are the principle focus of these meetings, particularly education in the investment and fiduciary responsibility area.

This conference provides an opportunity to brush up on the latest investment strategies, and get current on pension-related legislation.

See the website for more information and a detailed agenda.

Fees

\$120 - members
\$1,130 - affiliate members
\$2,670 - non-members

Contact

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

Email

sacrs@sacrs.org

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

Conference: Equity Research and Valuation

Start Date: November 14, 2017

Organizer: CFA Institute - Hosted with the New York Society of Security Analysts

End Date: November 15, 2017

Location: New York, New York

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

Topic Area: Investments

Attendance: Open To All

Will there be more market fluctuation in light of the current US and global environment? Where can investors find value? Should we be learning about sector investing and investment techniques that apply in the current marketplace?

Join world-class equity investors for insights into valuation to help you avoid the market's noise and herding effects and stay focused on a company's true intrinsic value. Learn about behavioral factors and investing. Learn why the price of risk is a key number to understand at all times. Discussions will include valuation approaches and analysis, global investment strategies, research methods, the current state of the markets, and the top questions equity investors face today.

See the website for more information and a detailed agenda.

Fees

\$1,295 - non-members
\$1,095 - CFA members

Contact

Phone: (434) 951-5499
Toll-free: 1 (800) 247-8132
Fax: (434) 951-5240

Email

programs@cfainstitute.org

Link: https://www.cfainstitute.org/learning/events/Pages/11142017_139239.aspx

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Strategic Investment Strategies Symposium

Start Date: November 14, 2017

Organizer: Institutional Investor

End Date: November 15, 2017

Location: Apella, New York

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

Topic Area: Investments

Attendance: By Invitation Only

This Symposium will assess the ways that pension funds, endowments, and foundations are increasingly employing systematic investment strategies to meet their investment objectives.

Topics include:

- What Do Systematic Strategies Bring to a Portfolio? What Is Their Role?
- Differentiating Between Systematic Strategies to Achieve Specific Investment Objectives
- The Dividing Line Between Quant Strategies and Alternative Beta/Factor-Based Investing
- Global Macro Drivers Which Will Have the Greatest Impact on Your Portfolio in 2018
- Assessing and Managing Business Risks and Counter-Party Risks (eg, IT Risk, Operational Risk, etc)
- Educating the Investment Committee/Board on Systematic Strategies

See the conference website for a detailed agenda.

Fees

No charge for corporate and public pension funds, endowments & foundations. 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/Systematic-Investment-Strategies-Symposium>

Course: Investment Decisions and Behavioral Finance

Start Date: November 15, 2017

Organizer: Harvard Kennedy School

End Date: November 17, 2017

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

\$4,800
Application deadline was September 15, 2017.

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Cutting-Edge Asset Management

Start Date: November 15, 2017

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

End Date: November 16, 2017

Location: Amsterdam, Netherlands

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

Topic Area: Investments

Attendance: Open To All

This is a unique training program for asset management professionals. It brings in current market conditions and up-to-date knowledge. The program provides the participants with a greater ability to i) see what the future has in store in that industry and ii) have a well-informed conversation on key topical asset management issues (e.g. factor investing, private equity, fintech).

The program gives you - as a participant - the big picture to help you understand where all the current conversations are coming from – their ins and outs. It is efficiently structured, covering all relevant topics in just two days. Minimal knowledge of financial markets is assumed.

See the website for more information.

Fees

€2,500 + VAT

Contact

Phone: +31 (0)20 520 0160

Fax: +31 (0)20 520 0161

Email

info@aif.nl

Link: <http://www.aif.nl/programs/open-enrollment-programs/cutting-edge-asset-management.aspx?PID=95>

Course: Audit Committee Effectiveness

Start Date: November 16, 2017

Organizer: Institute of Corporate Directors

End Date: November 16, 2017

Location: Edmonton, Alberta, Canada

Alternative Date(s) & Location(s) January 22, 2018, Toronto ON
January 25, 2018, Vancouver BC
April 19, 2018, Winnipeg MB

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is designed to help directors be most effective on the audit committee and move beyond the traditional role of compliance oversight. Dig into topics from annual work plans to management and auditor relationships to emerging national and global issues with a faculty that includes a seasoned audit committee chair, a sitting CFO, an experienced auditor, as well as insight from an internal auditor in residence.

See 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: October 19, 2017

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/Audit-Committee-Effectiveness.aspx>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Smart Beta Day Amsterdam

Start Date: November 21, 2017

Organizer: EDHEC-Risk Institute

End Date: November 21, 2017

Location: Amsterdam, Netherlands

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

Topic Area: Investments

Attendance: By Invitation Only

This conference enables participants to have access to the latest conceptual advances and research results in smart beta investing and to discuss their implications and applications with researchers who combine expertise of advanced financial techniques with a sound awareness of their industry relevance.

The conference will focus on a central theme which is risk management in smart beta and more particularly in factor investing. Good risk management implies accounting for the variations of beta and risk premia of the different factors to which the investor wants to be exposed whether in terms of long only or long/short strategies.

See the website for more information and a full program.

Fees

For asset owners and institutional consultants only.
No charge.

Contact

Joanne Finlay
Phone: +33 493 187 837

Email

joanne.finlay@edhec-risk.com

Link: http://www.edhec-risk.com/site_edhecisk/public/events/edhec_conferences/EDHEC-Risk_Smart_Beta_Day_Amsterdam_2017

Conference: ESG Solutions: Passive Investing

Start Date: November 21, 2017

Organizer: Responsible Investor

End Date: November 21, 2017

Location: Paris, France

Alternative Date(s) & Location(s) November 23, 2017, London, UK

Topic Area: Investments

Attendance: Open To All

Responsible Investor is a dedicated news and events service covering responsible investment, ESG and sustainable finance for institutional investors globally, and focusing on business-critical news and data.

This workshop will bring together a select group of market participants such as pension funds, investment consultants, asset managers and index providers. It will not feature panel discussions but rather conversations amongst like-minded peers who want to share and learn about how to integrate ESG into their passive investments.

See the website for more information.

Fees

No charge for asset owner and investment consultants.

Contact

Chido Tagarira
Phone: +44 20 7709 2094

Email

chido@responsible-investor.com

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

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: ESG Solutions: Passive Investing

Start Date: November 23, 2017

Organizer: Responsible Investor

End Date: November 23, 2017

Location: London, UK

Alternative Date(s) & Location(s) November 21, 2017, Paris, France

Topic Area: Investments

Attendance: Open To All

Responsible Investor is a dedicated news and events service covering responsible investment, ESG and sustainable finance for institutional investors globally, and focusing on business-critical news and data.

This workshop will bring together a select group of market participants such as pension funds, investment consultants, asset managers and index providers. It will not feature panel discussions but rather conversations amongst like-minded peers who want to share and learn about how to integrate ESG into their passive investments.

See the website for more information.

Fees

No charge for asset owner and investment consultants.

Contact

Chido Tagarira
Phone: +44 20 7709 2094

Email

chido@responsible-investor.com

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

Course: Private Equity

Start Date: November 27, 2017

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

End Date: November 29, 2017

Location: Amsterdam, Netherlands

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

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 both investing in tomorrow's blockbuster technologies and also reinvigorating the more established companies. It will provide an intense learning experience comprised of formal lectures, group discussions, exercises, and case studies.

See the website for more information about the program.

Fees

€3,600 + VAT

Contact

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

Email

info@aif.nl

Link: <http://www.aif.nl/programs/open-enrollment-programs/private-equity.aspx?PID=65>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Board Effectiveness Program

Start Date: November 27, 2017

Organizer: International Centre for Pension Management (ICPM) - In partnership

End Date: December 01, 2017

Location: Toronto, Ontario, Canada

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

Topic Area: Board Governance & Leadership

Attendance: Open To All

This is a unique international board governance program that is specifically targeted to Board members and trustees of pension and other long-horizon investment institutions. Leading pension practitioners and academics help participants understand their board role in key strategic areas:

- Organization mission
- Fiduciary duties
- Board dynamics
- Roles of boards vs. management
- Investment beliefs
- Management of risk
- Organization design
- Human resource management, including compensation
- Member communications

Fees

CAD \$6,950 + tax
(Deposit of 50% required with application)

Contact

Nathalie Vallee
Phone: 416.925.4153
Fax: 416.925.7377

Email

nathalie.vallee@rotman.utoronto.ca

Link: <http://www.icpmnetwork.com/icpm-events/board-effectiveness-program/>

Course: Project and Infrastructure Finance

Start Date: November 27, 2017

Organizer: London Business School

End Date: December 01, 2017

Location: London, UK

**Alternative Date(s)
& Location(s)** June 18-22, 2018, 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.

Fees

£6,900

Contact

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

Email

finance@london.edu

Link: <https://www.london.edu/programmes/executive-education/topic/finance/project-and-infrastructure-finance#.Wc0hXGeWzGg>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: ESG Integration Course

Start Date: December 04, 2017

Organizer: International Corporate Governance Network (ICGN)

End Date: December 05, 2017

Location: Paris, France

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

Topic Area: Corporate Governance

Attendance: Open To All

This program helps investors identify, analyse and integrate environmental, social and governance (ESG) information into the investment process and has been developed as part of European Commission project. It offers an intensive, interactive training experience with six modules over a two-day period and culminates in a case study to put into practice the learning outcomes, together with supplementary reading materials.

- Module 1: Overview of ESG in practice and international guidance
- Module 2: How to conduct an ESG analysis of a company
- Module 3: ESG and investment decision-making
- Module 4: Managing ESG responsibilities: theory and practice
- Module 5: Managing AGM voting
- Module 6: Effective engagement and communications
- Case Study: ESG engagement in practice

Fees

£1,500 - for non-members
£1,200 - for ICGN members
May be subject to 20% VAT

Contact

Ravina Patel
Events Administrator
Phone: +44 (0) 207 612 7089

Email

ravina.patel@icgn.org

Link: <https://www.icgn.org/events/esg-integration-course-paris>

Course: Value Investing

Start Date: December 05, 2017

Organizer: Columbia Business School

End Date: December 07, 2017

Location: New York, New York

Alternative Date(s) & Location(s) June 19-21, 2018, 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.

Fees

\$7,250

Contact

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

Email

Lns11@gsb.columbia.edu

Link: <http://www8.gsb.columbia.edu/execed/program-pages/details/61/VI>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: RI Americas

Start Date: December 05, 2017

Organizer: Responsible Investor

End Date: December 06, 2017

Location: New York, New York

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

Topic Area: Investments

Attendance: Open To All

Responsible Investor is a dedicated news and events service covering responsible investment, ESG and sustainable finance for institutional investors globally, and focusing on business-critical news and data. Topics for this conference include:

- What the Taskforce on Climate-Related Financial Disclosure (TCFD) recommendations mean for corporate and investor reporting, and investment strategy
 - Outlook on investor-corporate voting for 2018 and the growing impact of investor engagement.
 - How has the follow up to the 2017 proxy season panned out?
 - How consultants are promoting ESG integration for asset allocation, manager selection and review.
 - ESG integration into passive investing: why it's essential, and how to do it.
 - Green and sustainable bonds: what is holding back issuance?
 - Measuring the impact of investment and how this links with the UN SDGs.
- See the website for more information and a detailed agenda.

Fees

No charge for asset owner and investment consultants.

Contact

Jonathan Biddell
Phone: +44 20 3640 9141

Email

jonathan@responsible-investor.com

Link: https://www.responsible-investor.com/events/events_page/ri_americas_2017/

Conference: Liability Driven Investing Conference

Start Date: December 05, 2017

Organizer: Pensions & Investments

End Date: December 05, 2017

Location: Chicago, Illinois

Alternative Date(s) & Location(s) December 7, 2017, New York NY

Topic Area: Investments

Attendance: By Invitation Only

Liability Driven Investing has evolved considerably over the past several years. The tie between assets and liabilities is more precise, LDI strategies more customized, and glidepaths more sensitive to changes in the investing environment. This conference will examine the latest trends for designing, implementing, and managing an LDI strategy.

Topics to be discussed include:

- Creating a glidepath that ensures timely adjustments to changes in funded status or the economic environment
- Reducing surplus volatility for the investments and the funded status
- Incorporating swaptions and other structured products to hedge interest rates
- The role of multi-asset funds in an LDI framework
- Governance structures that ensure on-target outcomes
- LDI strategies for DC plans

See the website for more information and a detailed agenda.

Fees

No charge for plan sponsors and investment consultants.

Contact

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

Email

pi-registration@pionline.com

Link: <http://conferences.pionline.com/conference/liability-driven-investing/2017/>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Leading from the Chair

Start Date: December 06, 2017

Organizer: INSEAD

End Date: December 08, 2017

Location: Fontainebleau, Switzerland

Alternative Date(s) & Location(s) June 11-13, 2018, 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

Contact

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

Email

LC_Contact@insead.edu

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

Course: Smart Beta Day North America

Start Date: December 06, 2017

Organizer: EDHEC-Risk Institute

End Date: December 06, 2017

Location: New York, New York

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

Topic Area: Investments

Attendance: By Invitation Only

This conference enables participants to have access to the latest conceptual advances and research results in smart beta investing and to discuss their implications and applications with researchers who combine expertise of advanced financial techniques with a sound awareness of their industry relevance.

The conference will focus on a central theme which is risk management in smart beta and more particularly in factor investing. Good risk management implies accounting for the variations of beta and risk premia of the different factors to which the investor wants to be exposed whether in terms of long only or long/short strategies.

See the website for more information and a full program.

Fees

For asset owners and institutional consultants only.
No charge.

Contact

Joanne Finlay
Phone: +33 493 187 837

Email

joanne.finlay@edhec-risk.com

Link: http://www.edhec-risk.com/events/edhec_conferences/EDHEC-Risk_Smart_Beta_Day_North_America_2017

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Paris Conference

Start Date: December 06, 2017

Organizer: International Corporate Governance Network (ICGN)

End Date: December 07, 2017

Location: Paris, France

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

Topic Area: Corporate Governance

Attendance: Open To All

This conference will be hosted by Paris EUROPLACE, the organisation responsible for promoting the Paris financial marketplace. It will focus on latest developments in Europe.

See the website for more information and a detailed agenda.

Fees

£655 - non-members
£455 - ICGN members
May be subject to 20% VAT

Contact

Ravina Patel
Events Administrator
Phone: +44 (0) 207 612 7089

Email

ravina.patel@icgn.org

Link: <https://www.icgn.org/events/icgn-paris-event>

Conference: Liability Driven Investing Conference

Start Date: December 07, 2017

Organizer: Pensions & Investments

End Date: December 07, 2017

Location: New York, New York

Alternative Date(s) & Location(s) December 05, 2017, Chicago, IL

Topic Area: Investments

Attendance: By Invitation Only

Liability Driven Investing has evolved considerably over the past several years. The tie between assets and liabilities is more precise, LDI strategies more customized, and glidepaths more sensitive to changes in the investing environment. This conference will examine the latest trends for designing, implementing, and managing an LDI strategy.

Topics to be discussed include:

- Creating a glidepath that ensures timely adjustments to changes in funded status or the economic environment
- Reducing surplus volatility for the investments and the funded status
- Incorporating swaptions and other structured products to hedge interest rates
- The role of multi-asset funds in an LDI framework
- Governance structures that ensure on-target outcomes
- LDI strategies for DC plans

See the website for more information and a detailed agenda.

Fees

No charge for plan sponsors and investment consultants.

Contact

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

Email

pi-registration@pionline.com

Link: <http://conferences.pionline.com/conference/liability-driven-investing/2017/>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Strategic Human Resource Management Program

Start Date: January 22, 2018

Organizer: Rotman School of Management, University of Toronto

End Date: January 26, 2018

Location: Toronto, Ontario, Canada

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

Topic Area: Human Resources

Attendance: Open To All

This program will explore the critical elements that compose a successful human resource strategy including how to align strategy, people, performance and culture. Participants will gain an in-depth understanding into the challenges and dilemmas that senior human resource leaders face in their complex roles as strategist, change agent, integrator and business manager. The program content consists of the following:

One: Strategy and Competitive Advantage

Two: Linking HR to Business Strategy

Three: Talent Management

Four: Integrated Leadership Development and Succession

Five: Culture Building and Change

Six: Performance Alignment and Compensation

Seven: Aligning HR Structure

Eight: The Integrated Human Resources Strategy

Fees

CAD \$9,000 + HST

Contact

Phone: 416-978-8932

Email

ExecutivePrograms@rotman.utoronto.ca

Link: <http://www.rotman.utoronto.ca/ProfessionalDevelopment/Executive-Programs/CoursesWorkshops/Programs/Strategic-HR-Management.aspx>

Course: Audit Committee Effectiveness

Start Date: January 22, 2018

Organizer: Institute of Corporate Directors

End Date: January 22, 2018

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) November 16, 2017, Edmonton AB
January 25, 2018, Vancouver BC
April 19, 2018, Winnipeg MB

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is designed to help directors be most effective on the audit committee and move beyond the traditional role of compliance oversight. Dig into topics from annual work plans to management and auditor relationships to emerging national and global issues with a faculty that includes a seasoned audit committee chair, a sitting CFO, an experienced auditor, as well as insight from an internal auditor in residence.

See 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: December 28, 2017

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/Audit-Committee-Effectiveness.aspx>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Solutions-Oriented Investing Forum: Managing Risk & Liquidity

Start Date: January 23, 2018

Organizer: Institutional Investor

End Date: January 24, 2018

Location: San Francisco, California

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

Topic Area: Investments

Attendance: By Invitation Only

This Forum will present the latest, best thinking on the ways that North American pension funds and US endowments and foundations can respond to a volatile global investment landscape recognized for its rapidly changing dynamics. An opportunity and risk set which looks hardly at all like the world of even a few years ago – with one key exception, the continuing low rate environment which is driving so many strategic asset allocation decisions.

See the website for more information and a detailed agenda.

Fees

No charge for corporate and public pension funds, endowments & foundations. 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/7th-Annual-Solutions-Oriented-Investing-Forum-Managing-Risk-and>

Course: Audit Committee Effectiveness

Start Date: January 25, 2018

Organizer: Institute of Corporate Directors

End Date: January 25, 2018

Location: Vancouver, British Columbia, Canada

Alternative Date(s) & Location(s) November 16, 2017, Edmonton AB
January 22, 2018, Toronto ON
April 19, 2018, Winnipeg MB

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is designed to help directors be most effective on the audit committee and move beyond the traditional role of compliance oversight. Dig into topics from annual work plans to management and auditor relationships to emerging national and global issues with a faculty that includes a seasoned audit committee chair, a sitting CFO, an experienced auditor, as well as insight from an internal auditor in residence.

See 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: October 19, 2017

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/Audit-Committee-Effectiveness.aspx>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Legislative Conference

Start Date: January 28, 2018

Organizer: National Conference on Public Employee Retirement Systems

End Date: January 30, 2018

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.

Fees

Not yet available.
Previous year's fees:
\$500
\$100 discount for registration by
January 6, 2017

Contact

Phone: 202-624-1456
Toll-free: 1-877-202-5706
Fax: 202-624-1439

Email

conferences@ncpers.org

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

Course: Harvesting Risk Premia in Alternative Asset Classes and Investment **Start Date:** February 05, 2018

Organizer: Yale School of Management and EDHEC-Risk Institute

End Date: February 07, 2018

Location: New Haven, Connecticut

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

Topic Area: Investments

Attendance: Open To All

Investors are increasingly turning to alternative investments to find new ways of increasing the performance and decreasing the risk of their portfolio, in a context where the benefits of diversification within traditional equity and bond portfolios have decreased. Broadly speaking, this seminar shows how to deal with non-Gaussian returns, illiquid assets, and flawed data. It also presents qualitative and quantitative techniques to control asset-class exposures, and manages liquidity, valuation and counterparty risks for portfolio-wide decisions involving alternatives.

Day 1: Foundations and recent research advances in private equity, hedge funds, real estate and fine art

Day 2: Commodities: Investment narrative and fundamentals of commodity investing

Day 3: Infrastructure: Investment narrative, asset pricing and performance measurement

See the website for more information and a full program.

Fees

\$6,000

Contact

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

Email

david.pramer@yale.edu

Link: http://www.edhec-risk.com/AEducation/Certificate_In_Risk_and_Investment_Management

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Talent Management Strategies Conference

Start Date: February 06, 2018

Organizer: The Conference Board

End Date: February 07, 2018

Location: San Diego, California

Alternative Date(s) & Location(s) Feb. 28 - March 1, 2018, New York NY

Topic Area: Human Resources

Attendance: Open To All

The theme for this conference is "Perform into the Future". Participants will learn how leading organizations are preparing for future talent challenges based on the dynamic and changing global workforce. From talent acquisition and succession planning to career development and performance management, it has never been more critical to engage and optimize the workforce through implementing better talent management practices. You will:

- Build and develop your peer network with the TCB community.
- Explore best practices for developing talent management to meet requirements of the future.
- Interact with leading practitioners in your field, including non-profit, small and large business, oil, gas, and industrials.
- Learn "what's next" in the field of talent management, such as digital talent strategies and HCA.
- Learn what prominent thinkers and practitioners suggest doing now to prepare for the future.

More information about the conference is not yet available.

Fees

\$2,895 - non-members
\$400 discount for registration by
November 11, 2017

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=2905>

Course: High Performance Boards

Start Date: February 12, 2018

Organizer: IMD Business School

End Date: February 15, 2018

Location: Lausanne, Switzerland

Alternative Date(s) & Location(s) May 14-17, 2018, Lausanne
October 22-25, 2018, Lausanne

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course 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 and drive positive board culture
- Evaluate and mitigate risk and maximize opportunities through strategic board involvement
- Learn how to manage a board in crisis and ensure the best succession planning

See the website for more information about the program.

Fees

CHF 11,500

Contact

Didier Cossin,
Program Director
Phone: +41 (0)21 618 0700
Fax: +41 (0)21 618 0707

Email

N/A

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

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Institutional Investor Forum

Start Date: February 20, 2018

Organizer: Sovereign Wealth Fund Institute (SWFI)

End Date: February 21, 2018

Location: Santa Monica, California

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

Topic Area: Investments

Attendance: Open To All

The Sovereign Wealth Fund Institute (SWFI) is a global organization designed to study sovereign wealth funds, public pensions, superannuation funds, central banks and other long-term public investors in the areas of investing, asset allocation, risk, governance, economics, policy, trade and other relevant issues. It provides specialized services such as research and consulting to various corporations, funds and governments. In addition, SWFI facilitates sovereign fund, pension, endowment and central bank events around the world.

See the website for more information and a detailed agenda.

Fees

No charge for "public" institutional investors (including pension funds, endowment funds, sovereign wealth funds, etc.)

Contact

Phone: +1 1 (949) 228-4341

Email

events@swfinstitute.org

Link: <http://www.iinvestorforum.com/>

Course: Enterprise Risk Oversight for Directors

Start Date: February 22, 2018

Organizer: Institute of Corporate Directors

End Date: February 22, 2018

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) March 1, 2018, Calgary AB
March 2, 2018, Vancouver BC

Topic Area: Corporate Governance

Attendance: Open To All

Developed in collaboration with CPA Canada and based on CPA Canada's A Framework for Enterprise Risk Oversight for Directors, this course is designed to help directors better understand and oversee risk, including imbedded vulnerabilities and compounding effects from multiple risks.

The course is taught by John Caldwell, author of the CPA Canada Risk Framework, and supported by experienced Directors-in-Residence. It exposes participants to a new framework for the oversight of enterprise risk specifically:

- Gain an understanding of how to establish and oversee an organization's appetite and tolerance for risk;
- Learn how to apply and implement a risk oversight model; and
- Develop clearer insights into the interrelated and compounding effects of multiple risks.

See 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: January 25, 2018

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/Enterprise-Risk-Oversight-for-Directors.aspx>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Private Equity: Investing and Creating Value

Start Date: February 25, 2018

Organizer: The Wharton School, University of Pennsylvania

End Date: March 01, 2018

Location: San Francisco, California

Alternative Date(s) & Location(s) March 26-30, 2018, Philadelphia PA

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 latest concepts investors need to know to confidently evaluate investment opportunities in the private equity space and build optimal investment processes. During the program, participants will have an opportunity to focus on areas of individual interest, such as the limited partner perspective and private equity in emerging markets. Participants will learn the landscape of the private equity space and be exposed to concepts and tools that are used by private equity managers today.

See the website for more information about the program.

Fees

\$9,500

Contact

Phone: 215.898.1776

Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

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

Course: NFP Program

Start Date: February 26, 2018

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

End Date: February 27, 2018

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) April 23-24, 2018, Winnipeg MB
Apr 30-May 1, 2018, 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 website for more information about the program.

Fees

\$2,500 CAD + tax

Application deadline - January 25, 2018

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>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Principles of Macroeconomics & Impact on Capital Markets

Start Date: February 26, 2018

Organizer: BCA Research - Approved by the CFA Institute

End Date: February 27, 2018

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) March 14-16, 2018, Melbourne, Australia
March 19-20, 2018, Singapore

Topic Area: Investments

Attendance: Open To All

This course draws on BCA's analytical approach to teach the complex links between macroeconomics and markets. It emphasizes the fundamental macroeconomic concepts that drive financial markets. Participants will learn BCA Research's time-tested analytical framework to examine the three major financial markets: currencies, fixed income and equities. The course provides training on how to apply academic and professional macroeconomic analysis techniques to investment strategies. In addition to learning how to read and interpret major economic trends, it will explore how movements in certain assets can influence returns in other financial assets. It will teach you simple and accessible methods that are critical to understanding how global macro works.

See the website for more information about the program.

Fees

\$5,995 - non-BCA clients
Contact the program organizer for discounts for BCA clients & CFA members.

Contact

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

Email

academy@bcareserach.com

Link: <https://academy.bcareserach.com/toronto.html>

Conference: Global Real Assets Investment Forum

Start Date: February 27, 2018

Organizer: Institutional Investor

End Date: February 28, 2018

Location: Austin, Texas

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

Topic Area: Investments

Attendance: By Invitation Only

In two recent surveys of very large institutional investors, 65% of respondents reported their belief that more than 40% of an institution's assets have to be illiquid to get to "historical" returns expectations. As the traditional fixed income and equity markets prove unable to deliver the returns that institutions need to meet their liabilities, it is almost certain that allocations to these assets will increase. But which sectors, strategies and opportunities will investors seek the most value in?

For instance, 52% of respondents stated that they are interested in and actively researching opportunities in infrastructure. With many governments looking to increase public spending on infrastructure projects, the set of investable opportunities is likely to rise along with demand. Similarly, investors demonstrated interest in private equity, private debt/credit, and high conviction equity strategies which are likely to be among the most important opportunities institutional investors are weighing this year.

More information about the conference is not yet available.

Fees

No charge for corporate and public pension funds, endowments & foundations. 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/9th-Annual-Global-Real-Assets-Investment-Forum>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Talent Management Strategies Conference

Start Date: February 28, 2018

Organizer: The Conference Board

End Date: March 01, 2018

Location: New York, New York

Alternative Date(s) & Location(s) February 6-7, 2018, San Diego CA

Topic Area: Human Resources

Attendance: Open To All

The theme for this conference is "Perform into the Future". Participants will learn how leading organizations are preparing for future talent challenges based on the dynamic and changing global workforce. From talent acquisition and succession planning to career development and performance management, it has never been more critical to engage and optimize the workforce through implementing better talent management practices. You will:

- Build and develop your peer network with the TCB community.
 - Explore best practices for developing talent management to meet requirements of the future.
 - Interact with leading practitioners in your field, including non-profit, small and large business, oil, gas, and industrials.
 - Learn "what's next" in the field of talent management, such as digital talent strategies and HCA.
 - Learn what prominent thinkers and practitioners suggest doing now to prepare for the future.
- More information about the conference is not yet available.

Fees

\$2,895 - non-members
\$400 discount for registration by
November 11, 2017

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=2906>

Conference: ICGN-IIRC Tokyo Event

Start Date: February 28, 2018

Organizer: International Corporate Governance Network (ICGN) - In partnership with

End Date: March 01, 2018

Location: Tokyo, Japan

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

Topic Area: Corporate Governance

Attendance: Members Only

ICGN is joining with the International Integrated Reporting Council (IIRC) to host this joint event. The coming together of the two organisations in 2017, provided an opportunity to create better awareness and understanding around longer-term factors that influence business and investment decision-making. ICGN continues to promote the importance of meaningful engagement between boards of directors and institutional investors. It will work with the IIRC with whom it shares the common interest of the long-term success of companies to generate sustained value to create wealth for society as a whole.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

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

Email

elizabeth.thomas@icgn.org

Link: <https://www.icgn.org/events/icgn-iirc-tokyo-event>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Enterprise Risk Oversight for Directors

Start Date: March 01, 2018

Organizer: Institute of Corporate Directors

End Date: March 01, 2018

Location: Calgary, Alberta, Canada

Alternative Date(s) February 22, 2018, Toronto ON
& Location(s) March 2, 2018, Vancouver BC

Topic Area: Corporate Governance

Attendance: Open To All

Developed in collaboration with CPA Canada and based on CPA Canada's A Framework for Enterprise Risk Oversight for Directors, this course is designed to help directors better understand and oversee risk, including imbedded vulnerabilities and compounding effects from multiple risks.

The course is taught by John Caldwell, author of the CPA Canada Risk Framework, and supported by experienced Directors-in-Residence. It exposes participants to a new framework for the oversight of enterprise risk specifically:

- Gain an understanding of how to establish and oversee an organization's appetite and tolerance for risk;
- Learn how to apply and implement a risk oversight model; and
- Develop clearer insights into the interrelated and compounding effects of multiple risks.

See 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: February 1, 2018

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/Enterprise-Risk-Oversight-for-Directors.aspx>

Course: Enterprise Risk Oversight for Directors

Start Date: March 02, 2018

Organizer: Institute of Corporate Directors

End Date: March 02, 2018

Location: Vancouver, British Columbia, Canada

Alternative Date(s) February 22, 2018, Toronto ON
& Location(s) March 1, 2018, Calgary AB

Topic Area: Corporate Governance

Attendance: Open To All

Developed in collaboration with CPA Canada and based on CPA Canada's A Framework for Enterprise Risk Oversight for Directors, this course is designed to help directors better understand and oversee risk, including imbedded vulnerabilities and compounding effects from multiple risks.

The course is taught by John Caldwell, author of the CPA Canada Risk Framework, and supported by experienced Directors-in-Residence. It exposes participants to a new framework for the oversight of enterprise risk specifically:

- Gain an understanding of how to establish and oversee an organization's appetite and tolerance for risk;
- Learn how to apply and implement a risk oversight model; and
- Develop clearer insights into the interrelated and compounding effects of multiple risks.

See 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: February 2, 2018

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/Enterprise-Risk-Oversight-for-Directors.aspx>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: General Assembly

Start Date: March 03, 2018

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 06, 2018

Location: Indian Wells, California

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

Topic Area: General

Attendance: Members Only

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

See the conference website for more information.

Fees

Not available.
Please contact conference organizer.

Contact

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

Email

info@calaprs.org

Link: <http://www.calaprs.org/events/EventDetails.aspx?id=973115&group=>

Conference: The Rights and Responsibilities of Institutional Investors

Start Date: March 08, 2018

Organizer: Institutional Investor - Co-sponsored by Kessler Topaz Meltzer & Check

End Date: March 09, 2018

Location: Amsterdam, Netherlands

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

Topic Area: Corporate Governance

Attendance: By Invitation Only

More information about the conference is not yet available.

Fees

No charge for corporate and public pension funds, endowments & foundations. Please contact the conference organizer to register.

Contact

Ann Cornish
Audience Director
Phone: (212) 224-3877
Fax: (212) 224-3802

Email

acornish@iiforums.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/13-Annual-Rights-and-Responsibilities-Institutional-Investors>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: PREA Spring Conference

Start Date: March 08, 2018

Organizer: Pension Real Estate Association (PREA)

End Date: March 09, 2018

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.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

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

Email

amy@prea.org

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

Conference: Spring Conference

Start Date: March 11, 2018

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

End Date: March 13, 2018

Location: Los Angeles, California

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

Topic Area: Investments

Attendance: Members Only

The JOIM conferences showcase high quality presentations and a platform for interactive discussions of current topics in the investment management arena. This conference, co-sponsored with UCLA, will focus on "Behavioral Finance".

More information about the conference is not yet available.

Fees

Last year's fees:
\$5,000 - annual membership
(Spring & Fall Conference)
\$3,000 - guest (single
conference)

Contact

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

Email

customerservice@joim.com

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

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Spring Conference

Start Date: March 12, 2018

Organizer: Council of Institutional Investors

End Date: March 14, 2018

Location: Washington, District of Columbia

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

Topic Area: Corporate Governance

Attendance: Open To All

The Council of Institutional Investors (CII) is a nonprofit, nonpartisan association of corporate, public and union employee benefit funds and endowments with a focused policy mission: to be the leading voice for effective corporate governance practices for U.S. companies and strong shareowner rights and protections.

More information about the conference is not yet available.

Fees

No charge for members
Membership fee = \$1.30 per \$1 million in AUM.
(Minimum \$5,000 - maximum \$30,000)

Contact

Michael Miller
Phone: 202.822.0800

Email

michael@cii.org

Link: http://www.cii.org/ev_calendar_day.asp?date=3/12/2018&eventid=5

Course: Strategic Investment Management

Start Date: March 12, 2018

Organizer: London Business School

End Date: March 16, 2018

Location: London, UK

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

Topic Area: Investments

Attendance: Open To All

This program will help you develop a fuller understanding of key investment management themes and a practical understanding of equity and fixed-income portfolio management. You will learn about:

- 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

Fees

£7,300

Contact

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

Email

finance@london.edu

Link: <https://www.london.edu/programmes/executive-education/topic/finance/strategic-investment-management#.WY1kkWeWzGg>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Principles of Macroeconomics & Impact on Capital Markets

Start Date: March 14, 2018

Organizer: BCA Research - Approved by the CFA Institute

End Date: March 16, 2018

Location: Melbourne, Australia

Alternative Date(s) & Location(s) February 26-27, 2018, Toronto ON
March 19-20, 2018, Singapore

Topic Area: Investments

Attendance: Open To All

This course draws on BCA's analytical approach to teach the complex links between macroeconomics and markets. It emphasizes the fundamental macroeconomic concepts that drive financial markets. Participants will learn BCA Research's time-tested analytical framework to examine the three major financial markets: currencies, fixed income and equities. The course provides training on how to apply academic and professional macroeconomic analysis techniques to investment strategies. In addition to learning how to read and interpret major economic trends, it will explore how movements in certain assets can influence returns in other financial assets. It will teach you simple and accessible methods that are critical to understanding how global macro works.

See the website for more information about the program.

Fees

\$7,995 - non-BCA clients
Contact the program organizer for discounts for BCA clients & CFA members.

Contact

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

Email

academy@bcareserach.com

Link: <https://academy.bcareserach.com/melbourne.html>

Course: Foundations of Private Equity and Venture Capital

Start Date: March 18, 2018

Organizer: Harvard Business School, Harvard University

End Date: March 21, 2018

Location: Cambridge, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

This program will deepen your understanding of foundational issues and evolving trends in the private equity and venture capital industry.

Topics covered include:

- Survey of key limited partners, deal structures, and fundraising
- Review of term sheets, buyout structures, and industry terminology
- Key structures for financing used by venture capital investors
- Process of establishing and growing a private equity fund
- Strategies for blocking and tackling and raising capital
- Economics and incentives of general partner and limited partner relationships
- Impact and future implications of globalization in the investment industry
- Emerging challengers such as cloud funding, special-purpose acquisition companies, and other alternative investment firms

See the website for more information about the program.

Fees

\$10,000

Contact

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

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/programs/pevcf/Pages/default.aspx>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Principles of Macroeconomics & Impact on Capital Markets

Start Date: March 19, 2018

Organizer: BCA Research - Approved by the CFA Institute

End Date: March 20, 2018

Location: Singapore, Singapore

Alternative Date(s) & Location(s) February 26-27, 2018, Toronto ON
March 14-16, 2018, Melbourne, Australia

Topic Area: Investments

Attendance: Open To All

This course draws on BCA's analytical approach to teach the complex links between macroeconomics and markets. It emphasizes the fundamental macroeconomic concepts that drive financial markets. Participants will learn BCA Research's time-tested analytical framework to examine the three major financial markets: currencies, fixed income and equities. The course provides training on how to apply academic and professional macroeconomic analysis techniques to investment strategies. In addition to learning how to read and interpret major economic trends, it will explore how movements in certain assets can influence returns in other financial assets. It will teach you simple and accessible methods that are critical to understanding how global macro works.

See the website for more information about the program.

Fees

\$5,995 - non-BCA clients
Contact the program organizer for discounts for BCA clients & CFA members.

Contact

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

Email

academy@bcaresearch.com

Link: <https://academy.bcaresearch.com/newyork2.html>

Course: Masterclass in Private Equity

Start Date: March 20, 2018

Organizer: London Business School

End Date: March 23, 2018

Location: London, UK

Alternative Date(s) & Location(s) October 16-19, 2018, London, UK

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.

Fees

£6,300

Contact

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

Email

finance@london.edu

Link: <https://www.london.edu/programmes/executive-education/topic/finance/masterclass-in-private-equity#.Wc0gW2eWzGg>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Private Equity and Venture Capital

Start Date: March 21, 2018

Organizer: Harvard Business School, Harvard University

End Date: March 24, 2018

Location: Cambridge, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

This program helps you become a more successful investor by raising your level of investment expertise. Addressing the full range of industry models—from venture capital to growth equity to buyouts—the program explores critical issues related to industry infrastructure, portfolio strategies, and decision-making processes. It will help you:

- Evaluate the impact of market cycles so you can find opportunities with the most potential
 - Apply best practices for making investments—within your borders and in other countries
 - Assess opportunities in distressed and/or emerging industries
 - Examine how current earnings, risk, and organizational change influence deal source, valuation, and portfolio mix
 - Move quickly to select the best deals and negotiate the best terms with confidence
 - Monitor the progress of portfolio companies and choose appropriate exit strategies
 - Manage deals and integrate operations across multiple locations
 - Build strong relationships with other experienced industry leaders
- See the website for more information about the program.

Fees

\$10,000

Contact

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

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/programs/pevc/Pages/default.aspx>

Course: Board Human Resources Committee Program

Start Date: March 26, 2018

Organizer: Rotman School of Management, University of Toronto

End Date: March 28, 2018

Location: Toronto, Ontario, Canada

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

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program is designed specifically for directors and senior HR executives. It provides insight into the role of the Board Human Resources Committee and its critical importance to the organization. The program examines the Committee's strategic priorities, planning activities, governance mandates and its ability to create organizational value. Program participants learn best practices and the importance of aligning an organization's human resources, processes and culture to its business strategy and performance.

See the website for more information about the program.

Fees

CAD \$3,950 + HST

Contact

Phone: 416-978-8932

Email

ExecutivePrograms@rotman.utoronto.ca

Link: <https://www.rotman.utoronto.ca/ProfessionalDevelopment/Executive-Programs/CoursesWorkshops/Programs/Board-HR-Effectiveness>

The Cortex Report prepared for the San Francisco Employees' Retirement System

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

Start Date: March 26, 2018
End Date: March 30, 2018
Alternative Date(s) & Location(s) February 25 - March 1, 2018, San Francisco CA

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 latest concepts investors need to know to confidently evaluate investment opportunities in the private equity space and build optimal investment processes. During the program, participants will have an opportunity to focus on areas of individual interest, such as the limited partner perspective and private equity in emerging markets. Participants will learn the landscape of the private equity space and be exposed to concepts and tools that are used by private equity managers today.

See the website for more information about the program.

Fees

\$10,250

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>

Course: Impact Investing Program
Organizer: Said Business School, Oxford University
Location: Oxford, UK

Start Date: April 16, 2018
End Date: April 20, 2018
Alternative Date(s) & Location(s) N/A

Topic Area: Investments

Attendance: Open To All

This program provides an opportunity to develop a deep and broad understanding of impact investing. It debates workable solutions to complex endemic problems, discusses innovative impact investments from around the world, and develops impact measurement tools. The focus is on developing the practical skills essential to yield maximum social, environmental, and financial results.

See the website for more information about the program.

Fees

£6,000

Contact

Bradford Peaston
Phone: +44 (0)1865 422747

Email

bradford.peaston@sbs.ox.ac.uk

Link: <https://www.sbs.ox.ac.uk/programmes/execed/iip/welcome>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Human Resources & Compensation Committee Effectiveness

Start Date: April 17, 2018

Organizer: Institute of Corporate Directors

End Date: April 17, 2018

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) April 27, 2018, 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. It immerses participants in real-life examples and experiences, best practices, and topical issues faced by Human Resources/ Compensation Committee (HRCC) members including:

- The evolving role of the HRCC and the Chair of the HRCC
- Strategies for the design and monitoring of executive compensation and incentive plans
- CEO evaluation and succession planning
- The board's role in human capital and compensation beyond the CEO
- Identifying red flags and assessing risks associated with compensation

See 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: March 20, 2018

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: Defined Contribution Forum

Start Date: April 17, 2018

Organizer: Institutional Investor

End Date: April 18, 2018

Location: Chicago, Illinois

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

Topic Area: DC Plans

Attendance: By Invitation Only

Right now a lot of factors are shaking up the parameters of the 401k market in the United States, dramatically altering the landscape for plan sponsors. On the investments side returns from fixed income and mainstream equities are not likely to get participants to their savings goals. Further, more attention is being paid necessarily to the issues of retirement income; the problem is that no one really seems to have a viable solution capable to widespread adoption among plans. This forum will focus on how plan sponsors are responding to these macro influences. It will focus specifically on 3 critical themes:

- The latest thinking in retirement income solutions
- The changing role of the DC plan sponsor as a fiduciary and what this means for plan design and investment options
- Innovations in DC plan design and delivery

See the website for more information and a detailed agenda.

Fees

No charge for corporate and public pension funds, endowments & foundations. Please contact the conference organizer to register.

Contact

Alisha Patel
Phone: (212) 224-3620
Fax: (212) 224-3802

Email

alisha.patel@institutionalinvestor.com

Link: <http://www.iiconferences.com/dcr/>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Audit Committee Effectiveness

Start Date: April 19, 2018

Organizer: Institute of Corporate Directors

End Date: April 19, 2018

Location: Winnipeg, Manitoba, Canada

Alternative Date(s) & Location(s) November 16, 2017, Edmonton AB
January 22, 2018, Toronto ON
January 25, 2018, Vancouver BC

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is designed to help directors be most effective on the audit committee and move beyond the traditional role of compliance oversight. Dig into topics from annual work plans to management and auditor relationships to emerging national and global issues with a faculty that includes a seasoned audit committee chair, a sitting CFO, an experienced auditor, as well as insight from an internal auditor in residence.

See 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: March 22, 2018

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/Audit-Committee-Effectiveness.aspx>

Conference: Annual Conference

Start Date: April 22, 2018

Organizer: Public Retirement Information Systems Management (PRISM)

End Date: April 25, 2018

Location: San Diego, California

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

Topic Area: Operations

Attendance: Members Only

The Public Retirement Information Systems Management (PRISM) organization was formed in 1988 to provide a forum for Information Technology (IT) management of public retirement funds to collaborate and share their experiences with new technologies affecting the retirement and IT industries.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

Please go to the website to contact the conference organizer.

Email

N/A

Link: <https://prism-assoc.org/CustomPage?id=2>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Portfolio Concepts and Management

Start Date: April 23, 2018

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

End Date: April 26, 2018

Location: Philadelphia, Pennsylvania

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

Topic Area: Investments

Attendance: Open To All

This course provides the core principles of portfolio theory and investment performance measurement offering practical tools and experiences to make reliable investment management decisions. It is intended to grow confidence in your ability to evaluate investments with a broad, fundamental understanding of investment products and practices.

Topics include:

- Introduction and Overview of Financial Assets
- Fundamentals of Portfolio Theory
- Performance Evaluation
- Fundamentals of Valuation
- Macroeconomics and Financial Markets
- The Current Markets
- Asset Allocation and Impacts of Risk on Return

See website for more information about the program.

Fees

\$6,035 - non-members
\$5,595 - IFEBP members
\$300 discount for registration by March 12, 2018

Contact

Phone: (262) 786-6710
Fax: (262) 364-1818
Toll-free: (888) 334-3327

Email

edreg@ifebp.org

Link: <http://www.ifebp.org/education/certificateprograms/wharton/Pages/portfolio-concepts-and-management-1804.aspx>

Course: NFP Program

Start Date: April 23, 2018

Organizer: Institute of Corporate Directors and Rotman School of Management

End Date: April 24, 2018

Location: Winnipeg, Manitoba, Canada

Alternative Date(s) & Location(s) February 26-27, 2018, Toronto ON
Apr. 30-May 1, 2018, 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 website for more information about the program.

Fees

\$2,500 CAD + tax
Application deadline: February 15, 2018

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>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Public Funds Roundtable

Organizer: Institutional Investor

Location: Beverly Hills, California

Start Date: April 25, 2018

End Date: April 27, 2018

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

Topic Area: Investments

Attendance: By Invitation Only

Senior investment officers and seasoned trustees from the public employee community meet Institute members for a one and one-half day meeting examining front-burner investment management topics, plan administration concerns, and public policy issues.

More information about the conference is not yet available.

Fees

No charge for corporate and public pension funds, endowments & foundations. Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <http://www.iiconferences.com/pfr/>

Conference: Leadership Development Conference

Organizer: The Conference Board

Location: New York, New York

Start Date: April 26, 2018

End Date: April 27, 2018

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

Topic Area: Human Resources

Attendance: Open To All

HR leaders actively seek a balance in their strategic goals and tactical investments as they develop a pipeline of leaders who can effectively create meaningful cultures and lead in the next decade. Cost constraints force organizations to evaluate the impact of high-tech and high touch programs.

Learn how practitioners take steps to address critical leadership challenges at all levels of their enterprises. Having direct access to speakers and panelists enables attendees to customize their experience at the Conference to solve problems, brainstorm ideas and strengthen their leadership pipelines and the performance of their leaders at all levels of the organization.

More information about the conference is not yet available.

Fees

\$2,595
\$400 discount for registration by February 3, 2018

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=2841>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Human Resources & Compensation Committee Effectiveness

Start Date: April 27, 2018

Organizer: Institute of Corporate Directors

End Date: April 27, 2018

Location: Calgary, Alberta, Canada

Alternative Date(s) & Location(s) April 17, 2018, Toronto ON

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. It immerses participants in real-life examples and experiences, best practices, and topical issues faced by Human Resources/ Compensation Committee (HRCC) members including:

- The evolving role of the HRCC and the Chair of the HRCC
- Strategies for the design and monitoring of executive compensation and incentive plans
- CEO evaluation and succession planning
- The board's role in human capital and compensation beyond the CEO
- Identifying red flags and assessing risks associated with compensation

See 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: March 30, 2018

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: Defined Contribution Roundtable

Start Date: April 30, 2018

Organizer: Institutional Investor

End Date: May 01, 2018

Location: Chicago, Illinois

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

Topic Area: DC Plans

Attendance: By Invitation Only

The Institutional Investor Institute for Defined Contribution is a private membership organization for the nation's DC plan sponsors as well as supporting members from the industry's leading asset management firms, providers, and consultants. Members and supporting 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.

Built by plan sponsors for plan sponsors, 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 charge for corporate and public pension funds, endowments & foundations. Please contact the conference organizer to register.

Contact

Alisha Patel
Phone: (212) 224-3620
Fax: (212) 224-3802

Email

alisha.patel@institutionalinvestor.com

Link: <https://www.iiconferences.com/institutional-investor-institute-defined-contribution/3rd-Annual-Defined-Contribution-Roundtable>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: NFP Program

Start Date: April 30, 2018

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

End Date: May 01, 2018

Location: Vancouver, British Columbia, Canada

Alternative Date(s) & Location(s) February 26-27, 2018, Toronto ON
April 23-24, 2018, Winnipeg MB
June 6-7, 2018, 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 website for more information about the program.

Fees

\$2,500 CAD + tax
Application deadline: March 28, 2018

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: Trustee Education Seminar

Start Date: May 12, 2018

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 13, 2018

Location: Hollywood, Florida

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.

This two-day program provides an introduction to fiduciary responsibilities, creating a solid foundation of knowledge for those who have limited experience in pension plan trusteeship. Program content is designed to address the critical elements of trust fund management including, important topics such as investing, legal requirements and trustee ethics.

More information about the conference is not yet available.

Fees

Not yet available.
Previous year's fees:
\$650
\$200 discount for registration by
April 25, 2017.

Contact

Phone: 202-624-1456
Toll-free: 1-877-202-5706
Fax: 202-624-1439

Email

conferences@ncpers.org

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

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Annual Conference and Exhibition

Start Date: May 13, 2018

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 16, 2018

Location: Hollywood, Florida

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

Topic Area: General

Attendance: Members Only

The NCPERS Annual Conference provides an opportunity to keep up-to-date on pension trends, best practices and the latest news and information pertinent to your fiduciary obligations.

More information about the conference is not yet available.

Fees

Not yet available.

Previous year's fees:

\$1,000

\$200 discount for registration by April 25, 2017.

Contact

Phone: 202-624-1456

Toll-free: 1-877-202-5706

Fax: 202-624-1439

Email

conferences@ncpers.org

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

Conference: Annual Conference

Start Date: May 13, 2018

Organizer: CFA Institute

End Date: May 16, 2018

Location: Hong Kong, China

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

Topic Area: Investments

Attendance: Open To All

The CFA Institute Annual Conference is one of the investment industry's largest and longest running educational gatherings of investment professionals, attracting as many as 2,000 delegates from 70 countries and territories in recent years. You will:

- Learn from noted economists, best-selling authors, leading researchers, and successful practitioners;
- Refresh and hone your skills with new ideas and research on a full range of investment topics;
- Meet and network with investment peers from around the world;
- Explore global and regional financial trends; and
- Examine new investment opportunities and risks.

More information about the conference is not yet available.

Fees

HK\$ 11,300

KH\$ 9,000 for CFA members

HK\$ 1,550 discount for registration by December 31, 2017

Contact

Phone: (434) 951-5499

Toll-free: 1 (800) 247-8132

Fax: (434) 951-5240

Email

programs@cfainstitute.org

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

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: High Performance Boards

Organizer: IMD Business School

Location: Lausanne, Switzerland

Start Date: May 14, 2018

End Date: May 17, 2018

Alternative Date(s) & Location(s) February 12-15, 2018, Lausanne
October 22-25, 2018, Lausanne

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course 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 and drive positive board culture
- Evaluate and mitigate risk and maximize opportunities through strategic board involvement
- Learn how to manage a board in crisis and ensure the best succession planning

See the website for more information about the program.

Fees

CHF 11,500

Contact

Didier Cossin,
Program Director
Phone: +41 (0)21 618 0700
Fax: +41 (0)21 618 0707

Email

N/A

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

Conference: Spring Conference

Start Date: May 15, 2018

Organizer: State Association of County Retirement Systems (SACRS)

End Date: May 18, 2018

Location: Anaheim, 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. SACRS meets as an organization twice a year with all 20 counties participating through attendance by Trustees, Administrators, Treasurers and staff. Education and legislation are the principle focus of these meetings, particularly education in the investment and fiduciary responsibility area.

This conference provides an opportunity to brush up on the latest investment strategies, and get current on pension-related legislation.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

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

Email

sacrs@sacrs.org

Link: <https://sacrs.org/events/events-listing/>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Redefining Fixed Income Forum

Start Date: May 17, 2018

Organizer: Institutional Investor

End Date: May 18, 2018

Location: Chicago, Illinois

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

Topic Area: DC Plans

Attendance: By Invitation Only

More information about the conference is not yet available.

Fees

No charge for corporate and public pension funds, endowments & foundations. Please contact the conference organizer to register.

Contact

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

Email

kstorfer@institutionalinvestor.com

Link: <http://www.iiconferences.com/rfi/>

Course: Investment Strategies and Portfolio Management

Start Date: May 21, 2018

Organizer: The Wharton School, University of Pennsylvania

End Date: May 25, 2018

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Oct. 22-26, 2018, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

As a finance or investment professional, you are presented with diverse opportunities in emerging markets, real estate, hedge funds, derivatives, and other alternative investments. As the choices increase, shaping and monitoring investment portfolios becomes more complicated. Which investments will generate the highest returns without exposing you to excessive risk? This program will teach you how to evaluate this fundamental issue and manage related risk. It examines specific investment areas such as stocks, bonds, derivatives, real estate, and global investments, to enable you to build optimal investment portfolios and make better investments.

See the website for more information about the program.

Fees

\$10,250

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 Cortex Report prepared for the San Francisco Employees' Retirement System

Course: NFP Program

Start Date: June 06, 2018

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

End Date: June 07, 2018

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) February 26-27, 2018, Toronto ON
April 23-24, 2018, Winnipeg MB
Apr. 30-May 1, 2018, Vancouver

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 website for more information about the program.

Fees

\$2,500 CAD + tax
Application deadline: May 3, 2018

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 10, 2018

Organizer: International Centre for Pension Management (ICPM)

End Date: June 12, 2018

Location: Toronto, 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

Karen.Clarke@Rotman.Utoronto.ca

Link: <http://www.icpmnetwork.com/icpm-discussion-forum-spring-2018-toronto/>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Oxford Chicago Valuation Program
Organizer: Said Business School, Oxford University
Location: Oxford, UK

Start Date: June 11, 2018

End Date: June 15, 2018

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

Topic Area: Investments

Attendance: Open To All

The valuation of a company, asset or investment is a vital factor in many decisions. These include selling off part of a family firm, privatising a national industry, raising finance for an infrastructure project or deciding where to invest a pension or private equity fund. This program will teach, apply, and discuss corporate and investment valuation, combining and comparing approaches from both sides of the Atlantic. It will go beyond the basic models to apply them to complex real life transactions. It will discuss financing structures that effect corporate and investment valuation and provide a series of snapshots and solutions to the challenges presented by complex cases such as IPO, LBO, Distress, Infrastructure and Growth Capital.

See the website for more information about the program.

Fees

£7,000

Contact

Steve Brewster

Phone: +44 (0)1865 422747

Email

steve.brewster@sbs.ox.ac.uk

Link: <http://www.sbs.ox.ac.uk/programmes/execed/ocvp/welcome>

Course: Leading from the Chair
Organizer: INSEAD
Location: Fontainebleau, Switzerland

Start Date: June 11, 2018

End Date: June 13, 2018

Alternative Date(s) & Location(s) Dec. 6-8, 2017, 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

Contact

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

Email

LC_Contact@insead.edu

Link: <http://executive-education.insead.edu/chair-of-the-board>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: CIO Summit

Start Date: June 14, 2018

Organizer: National Conference on Public Employee Retirement Systems

End Date: June 15, 2018

Location: Hollywood, Florida

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

Topic Area: Board Governance & Leadership

Attendance: Members Only

The CIO Summit is the culmination of extensive research and engagement with NCPERS' membership over the course of 12 months in 2016. NCPERS worked with a small group of public plan CIOs, interviewed nearly 20 public pensions, and conducted a membership-wide survey on the needs of public pension investment staff. A consistent theme from this field research was a desire and need of CIOs—particularly mid-market plan CIOs—to learn, network, and share with peers. The CIO Summit seeks to fill this need. This program will focus on the distinct investment challenges mid-market plans face, and work collaboratively to find solutions to them. A few unique features of the CIO Summit are:

- Attendees are CIOs, or their designated senior surrogate, from funds with assets between \$2 billion and \$60 billion.
 - It will be limited to 40 attendees to promote active participation and discussion.
 - The agenda will be developed by peer, mid-market, CIOs.
 - It will be closed to marketers from the vendor community.
- More information about the conference is not yet available.

Fees

Not yet available.

Contact

Phone: 202-624-1456
Toll-free: 1-877-202-5706
Fax: 202-624-1439

Email

conferences@ncpers.org

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

Course: Project and Infrastructure Finance

Start Date: June 18, 2018

Organizer: London Business School

End Date: June 22, 2018

Location: London, UK

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

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.

Fees

£7,300

Contact

Phone: +1 888 203 1804
Fax: +1 212 480 2974

Email

usclientservices@fitchlearning.com

Link: <https://www.london.edu/programmes/executive-education/topic/finance/project-and-infrastructure-finance#.WYInqGeWzGg>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Value Investing

Start Date: June 19, 2018

Organizer: Columbia Business School

End Date: June 21, 2018

Location: New York, New York

Alternative Date(s) & Location(s) December 5-7, 2017, 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.

Fees

\$7,500

Contact

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

Email

Lns11@gsb.columbia.edu

Link: <http://www8.gsb.columbia.edu/execed/program-pages/details/61/VI>

Conference: Annual Conference

Start Date: June 25, 2018

Organizer: International Corporate Governance Network (ICGN)

End Date: June 28, 2018

Location: Milan, Italy

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

Topic Area: Corporate Governance

Attendance: Open To All

This will be hosted by Assogestioni, which represents the majority of Italian and foreign investment management firms operating in Italy. The ICGN annual conference attracts over 500 senior global investors, company representatives, regulators, stock exchanges, government officials and professional advisors from around the world.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

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

Email

elizabeth.thomas@icgn.org

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

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Private Equity Program

Start Date: June 25, 2018

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

End Date: June 29, 2018

Location: Oxford, UK

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

Topic Area: Investments

Attendance: Open To All

This program offers a comprehensive framework for assessing the future prospects for private equity after the credit crisis and increased regulatory forces. It discusses the risk characteristics of private equity, how deals are valued, the due diligence process, the role of leverage, and exit routes. An examination of how performance is benchmarked provides the skills to evaluate potential private equity opportunities. The program discusses:

- Private equity as an asset class in a larger portfolio
- Sources of value creation by private equity funds
- The incentives driving key players in the industry
- Selection and assessment of fund performance
- Leveraged buyouts and structuring of investments
- Co-investment and direct investing
- Emerging market private equity investing
- Venture Capital
- Exit routes

Fees

£7,000
£250 discount for CFA members

Contact

Steve Brewster
Phone: +44 (0)1865 422747

Email

steve.brewster@sbs.ox.ac.uk

Link: <http://www.sbs.ox.ac.uk/programmes/execed/pe/welcome>

Conference: Evolving Fiduciary Obligations of Institutional Investors

Start Date: June 25, 2018

Organizer: Institutional Investor - Co-hosted by Kessler Topaz Meltzer & Check LLP

End Date: June 26, 2018

Location: ,

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

Topic Area: Corporate Governance

Attendance: By Invitation Only

More information about the conference is not yet available.

Fees

No charge for corporate and public pension funds, endowments & foundations. Please contact the conference organizer to register.

Contact

Ann Cornish
Audience Director
Phone: (212) 224-3877
Fax: (212) 224-3802

Email

acornish@iiforums.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/events/9th-Annual-Evolving-Fiduciary-Obligations-Institutional>

The Cortex Report prepared for the San Francisco Employees' Retirement System

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

Start Date: July 08, 2018

Organizer: Harvard Kennedy School, Harvard University

End Date: July 20, 2018

Location: Cambridge, Massachusetts

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

Topic Area: Investments

Attendance: Open To All

This course helps 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

Application deadline: May 8, 2018

Contact

Phone: +1-617-496-9000

Email

exed@hks.harvard.edu

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

Conference: Summer Roundtable

Start Date: July 11, 2018

Organizer: Pacific Pension Institute

End Date: July 13, 2018

Location: La Jolla, California

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

Topic Area: Risk Management

Attendance: Members Only

The Pacific Pension & Investment Institute (PPI) has held forums for over two decades that inform the investment decisions of the world's major institutional investors as they relate to Asia, the Pacific Rim, and the world. These forums, exclusively for members, are conducted in a collegial, trusted, and marketing-free environment, which allows in-depth and off-the-record dialogue.

More information about the conference is not yet available.

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/#more-programs>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Alternative Investment Strategies

Start Date: July 30, 2018

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

End Date: August 01, 2018

Location: San Francisco, California

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

Topic Area: Investments

Attendance: Open To All

This program that provides practical education to help you understand the complexities of alternative investments. Focused on the topics of hedge funds and real estate investing for benefit funds, this advanced-level course will provide you with the tools to make effective investment decisions.

The program is for those who have a solid grasp of investment fundamentals and seek to learn more about how their fund could assess the use of alternative investments. It is designed to build upon participants' existing knowledge base and experience. While there are no formal prerequisites for this program, those without prior knowledge of fundamental investment theory will most likely find this program too advanced and are encouraged to register for the Portfolio Concepts and Management program.

See the website for more information about the program.

Fees

\$4,595 - non-members
\$4,295 - members
\$300 discount for registration by June 18, 2018

Contact

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

Email

edreg@ifebp.org

Link: <http://www.ifebp.org/education/certificateprograms/wharton/Pages/alternative-investment-strategies-18h5.aspx>

Conference: PRI in Person

Start Date: September 12, 2018

Organizer: Principles for Responsible Investment (PRI)

End Date: September 14, 2018

Location: San Francisco, California

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

Topic Area: Corporate Governance

Attendance: Open To All

This conference provides a platform for PRI signatories and other investment professionals to learn, network and collaborate in person over a three-day period. 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 will run alongside the Global Climate Action Summit, a major event organised by the State of California, which will bring together leaders from government, business and the global community to inspire greater global ambition to act on climate. In line with this, investor action on climate change will be a key focus for PRI in Person 2018, but it will also cover a wide range of other themes including ESG integration, active ownership and emerging ESG issues.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

Meegan Marais
Phone: +44 (0)20 3714 3200

Email

events@unpri.org

Link: <https://www.unpri.org/events/pri-in-person-2018-2018-09-12-2018-09-14-188/register>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Annual Institutional Investor Real Estate Conference

Start Date: October 03, 2018

Organizer: Pension Real Estate Association (PREA)

End Date: October 05, 2018

Location: Boston, Massachusetts

**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.

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: Annual Conference

Start Date: October 06, 2018

Organizer: National Council on Teacher Retirement (NCTR)

End Date: October 10, 2018

Location: Washington, District of Columbia

**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. 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

Not yet available.

Contact

Robyn Wheeler
Phone: (916) 897-9139
Fax: (916) 897-9315

Email

rwheeler@nctr.org

Link: <http://www.nctr.org/events/conferences/future-conferences/>

The Cortex Report prepared for the San Francisco Employees' Retirement System

Course: Masterclass in Private Equity

Organizer: London Business School

Location: London, UK

Start Date: October 16, 2018

End Date: October 19, 2018

Alternative Date(s) & Location(s) March 20-23, 2018, London, UK

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.

Fees

£6,300

Contact

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

Email

finance@london.edu

Link: <https://www.london.edu/programmes/executive-education/topic/finance/masterclass-in-private-equity#.Wc0gW2eWzGg>

Course: Investment Strategies and Portfolio Management

Organizer: The Wharton School, University of Pennsylvania

Location: Philadelphia, Pennsylvania

Start Date: October 22, 2018

End Date: October 26, 2018

Alternative Date(s) & Location(s) May 21-25, 2018, Philadelphia, PA

Topic Area: Investments

Attendance: Open To All

As a finance or investment professional, you are presented with diverse opportunities in emerging markets, real estate, hedge funds, derivatives, and other alternative investments. As the choices increase, shaping and monitoring investment portfolios becomes more complicated. Which investments will generate the highest returns without exposing you to excessive risk? This program will teach you how to evaluate this fundamental issue and manage related risk. It examines specific investment areas such as stocks, bonds, derivatives, real estate, and global investments, to enable you to build optimal investment portfolios and make better investments.

See the website for more information about the program.

Fees

\$10,250

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 Cortex Report prepared for the San Francisco Employees' Retirement System

Conference: Discussion Forum

Start Date: October 22, 2018

Organizer: International Centre for Pension Management (ICPM)

End Date: October 24, 2018

Location: Santiago, Chile

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 conference is not yet available.

Fees

Not available. Please contact the conference organizer.

Contact

Karen Clarke
Phone: 416.925.4153
Fax: 416.925.7377

Email

Karen.Clarke@Rotman.Utoronto.ca

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

Course: High Performance Boards

Start Date: October 22, 2018

Organizer: IMD Business School

End Date: October 25, 2018

Location: Lausanne, Switzerland

Alternative Date(s) & Location(s) February 12-15, 2018, Lausanne
May 14-17, 2018, Lausanne

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course 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 and drive positive board culture
- Evaluate and mitigate risk and maximize opportunities through strategic board involvement
- Learn how to manage a board in crisis and ensure the best succession planning

See the website for more information about the program.

Fees

CHF 11,500

Contact

Didier Cossin,
Program Director
Phone: +41 (0)21 618 0700
Fax: +41 (0)21 618 0707

Email

N/A

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

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Cortex Applied Research Inc.
2489 Bloor Street West, Unit 304
Toronto Ontario M6S 1R6
Tel: (416) 967-0252 Fax: (416) 967-2711
e-mail: info@cortexconsulting.com