

PUBLIC RETIREMENT CONFERENCES AND TRAINING PROGRAMS FOR SFERS TRUSTEES

July 2017 to July 2018

Date	Sponsor	Program	Location
July 24-25, 2017	The Pension Bridge	The Private Equity Exclusive <i>The Pension Bridge describes the conference as “the only private equity conference in the institutional investment industry with a controlled attendance structure that is designed to benefit the LPs, GPs and Consultants. The most influential investment decision-makers, most closely involved with Pension Plan Private Equity allocations, will come together for this exclusive event. Leading LPs from Public Pension Plans, Corporate Funds, Sovereign Wealth Funds, Foundations, Endowments, Family Offices, Non-Discretionary Private Equity Consultants, General Partners and Fund of Funds will join us in this unique setting.”</i>	Chicago, IL
July 24-26, 2017	State Association of County Retirement Systems (SACRS)	Public Pension Investment Management Program <i>This program, entitled “Modern Investment Theory & Practice for Retirement Systems,” is designed for trustees and executive staff of public pension funds with a focus on the investment-related responsibilities of fund trustees. It is intended to provide both the theory behind portfolio development and practical approaches for trustees and staff.</i>	Berkeley, CA (Haas School of Business)
July 25-26, 2017	Callan	Introduction to Investments <i>According to the Conference sponsor, this session familiarizes retirement system trustees, staff, and asset management advisors with basic investment theory, terminology, and practices. It lasts one-and-a-half days and is designed for individuals who have less than two years of experience with asset-management oversight and/or support responsibilities.</i>	San Francisco, CA
Aug. 28-31, 2017	California Association of Public Retirement Systems (CALAPRS)	Principles of Pension Management <i>This program provides trustees of public pension plans with in-depth training on topics of relevance to administration of the plans, including fiduciary duties, ethics, disability retirement, investment and actuarial responsibilities. It is geared toward newer trustees, but may provide a refresher for other trustees as well.</i>	Malibu, CA (Pepperdine University)
Sept. 10-12, 2017	National Council on Public Employee Retirement Systems (NCPERS)	Public Pension Funding Forum <i>This program is open to members and non-NCPERS members. NCPERS describes the overarching goal of the Form as “to inject some new thinking that might solve the funding challenges without dismantling public pensions, and hence enhance prosperity for all.” The Forum will “examine the obstacles that stand in the way of closing public pension funding gap and explore new solutions to overcome such obstacles, including better risk management in economic cycles, use of new and improved debt instruments, and closing tax loopholes.”</i>	Palo Alto, CA (Stanford University)

Sept. 11-15, 2017	Wharton	Investment Strategies & Portfolio Management <i>This program is intended for finance and investment professionals. However, it also provides comprehensive investment training that many public retirement system trustees have found to be useful. The program highlights the following: manage investments more effectively; apply practical frameworks and tools for better asset allocation; understand risks and opportunities offered by derivatives, hedge funds, real estate, and alternate investments; work more effectively with portfolio managers; and understand the concept of behavioral finance.</i>	Philadelphia, PA
Sept.13-15, 2017	Council of Institutional Investors (CII)	Fall Conference <i>CII Conferences are members-only events. This CII program includes sessions on “Impacts of Immigration Policies on Institutional Investors,” “Implementing the Paris Agreement goals,” “Shareholder Evaluation of Directors,” and “Diversifying Diversity: Exploring the Dimensions of a Truly Diversified Board,” among others.</i>	San Diego, CA
Sept. 30-Oct. 1, 2017	NCPERS	“Accredited Fiduciary Program” <i>NCPERS describes its “Accredited Fiduciary (NAF) Program” as “an accreditation trustee program specifically designed and tailored for public pension governance. NAF divides plan governance, oversight and administration into four modules. Each module delves into the fundamental components and strategies necessary for governing a public pension fund, allowing trustees and plan staff to walk away with the key competencies critical to their fiduciary responsibilities.” The four modules are: (i) Governance and the Board’s Role; (ii) Investment and Finance; (iii) Legal, Risk Management and Communication; and (iv) Human Capital.</i>	San Antonio, TX
Oct. 1-4, 2017	NCPERS	Public Safety Employees Pension & Benefits Conference <i>NCPERS describes this conference as “the premier forum bringing together pension administrators, trustees, union leaders, and representatives of the financial community to discuss issues related exclusively to retirement and other benefits for public safety employees.”</i>	San Antonio, TX
Oct. 16-18, 2017	Pension Real Estate Association (PREA)	27 th Annual Institutional Investor Real Estate Conference <i>PREA seeks through its conferences to provide its members who are engaged in institutional real estate investment with objective forums for education, research initiatives, membership interaction and the exchange of information.</i>	Chicago, IL
Oct. 23-25, 2017	California Retired County Employees’ Association (CRCEA)	Fall Conference <i>This program focuses on retiree issues of those within the twenty county retirement systems in California governed by the County Employees’ Retirement Law of 1937. However, CRCEA also welcomes attendees from independent public retirement systems such as SFERS. This conference provides comprehensive training</i>	Emeryville, CA

		<i>and networking opportunities for retired members of public retirement systems in California.</i>	
Oct. 29-Nov. 1, 2017	NCPERS	Public Safety Employees Pension & Benefits Conference <i>The Public Safety Employees Pension & Benefits Conference is dedicated to providing quality education that is specifically tailored for the unique needs and demands of public safety pensions. Since 1985, the Conference has educated hundreds of public safety pension trustees, administrators and staff; union officials; and local elected officials by featuring presentations from recognized leaders in both the worlds of finance and politics, providing news on the latest developments, and offering attendees the opportunity to network with fellow trustees.</i>	San Antonio, TX
Nov. 14-17, 2017	SACRS	Fall Conference <i>This program focuses on the twenty county retirement systems in California governed by the County Employees' Retirement Law of 1937. However, SACRS also welcomes attendees from independent public retirement systems such as SFERS. This conference provides comprehensive training and networking opportunities for trustees, staff and others who are interested in public retirement systems in California.</i>	Burlingame, CA
Nov. 30-Dec. 1, 2017	Nossaman	Annual Fiduciaries' Forum <i>This program is intended for trustees, executive staff and in-house counsel to cover some of the key legal issues of the year for California public retirement systems. The theme of this year's forum is "Fiduciary Challenges in an Evolving Legal Landscape," with an emphasis on board governance and the proper exercise of fiduciary authority and discretion in context of disputed issues among retirement system stakeholders, understanding and managing fiduciaries' investment-related legal challenges, and a discussion of the benefits and drawback of different investment structures. There will also be a hot topics session highlighting latest lessons on retirement system insurance coverage, tax issues, cyber protection, and subscription booklets.</i>	San Francisco, CA
March 3-6, 2018	CALAPRS	General Assembly 2018 <i>This program is provided to CALAPRS members only. It provides comprehensive training and networking opportunities for trustees, staff and other interested parties of all of the public retirement systems in California.</i>	Indian Wells, CA
March 8-9, 2018	Pension Real Estate Association (PREA)	PREA Spring Conference <i>PREA seeks through its conferences to provide its members who are engaged in institutional real estate investment with objective forums for education, research initiatives, membership interaction and the exchange of information.</i>	Beverly Hills, CA

March 12-14, 2018	CII	Spring Conference <i>See description of Fall Conference above. The agenda for this program has not yet been posted. Typically, it includes comprehensive programs on Corporate Governance, aimed at training trustees and executive staff of public pension funds nationally on these issues. Meetings with Congressional Staff may be included.</i>	Washington, DC
April 30-May 1, 2018	Institutional Investor Forums	Defined Contribution Roundtable <i>This is the 3d Annual Defined Contribution Roundtable. The sponsor of the program states "The inaugural Defined Contribution Roundtable, held May 2016, brought to light a great deal of information and provided a great number of insights into the issues facing DC schemes with approximately \$200 million to \$800 million in plan assets, but none so unequivocally as the tremendous need — and hunger — for lessons learned and the chance to share expertise among peers in this community."</i>	Chicago, IL
May 15-18, 2018	SACRS	Spring Conference (See description of Fall Conference above)	Anaheim, CA