



**October 6 – 8, 2026**

***“Cruisin’ into the Future with PensionGold!”***



***Conference Location:***

**Crowne Plaza Hotel & Convention Center**

**3000 South Dirksen Parkway, Springfield, Illinois 62703**



**DRAFT AGENDA**

**(August 27, 2026)**

LRS Retirement Solutions  
PensionGold Teaming Conference  
October 6-8, 2026  
Agenda

**Day 1 – Tuesday, October 6th – at Crowne Plaza, Springfield**

**6:00 - 8:30 AM**

**Breakfast at conference hotel – Long 9 Restaurant**

**8:00 AM – 8:30 AM**

**Check-In / Pick up Name Badge**

**8:30 AM – 9:50 AM**

**Getting Started: Welcome and Conference Overview**  
*(Session 1)*

Welcome to the Annual PensionGold Teaming Conference as we celebrate the 100th anniversary of the iconic Route 66 Mother Road! We'll start with a brief history of LRS and the Retirement Solutions group, followed by the latest updates and insights into our future plans and vision. During the session, we'll do a roll-call introduction of customers alongside members of the Product Support team. You'll also receive an overview of the conference agenda, this year's theme, and exciting details about the Team Challenge. Toward the end, attendees will break into small groups to connect with fellow participants.

**10:05 AM – 10:55 AM**

**Protecting the Journey: Security Best Practices** *(Session 2)*

*Presented by Phil Sporcich and Chris Collins*

Join the Product Support team as our experts share security best practices for the PensionGold suite of products. This valuable session highlights key security features across PensionGold and MemberDirect and underscores the importance of safeguarding member data. As we continue cruising down Route 66, we will also make a pit stop to review recent NACHA rule amendments related to ACH fraud monitoring and discuss how these changes can help protect retirement payments and member information.

**Getting Started with LRS Retirement Solutions** *(Session 4)*

*Presented by Trevor Donahue and Alicia Rawlings*

Are you a first-time conference attendee, a new PensionGold user, or currently involved in an implementation project? If so, this session is for you. Join us to explore the Who, What, Why, and How of the Retirement Solutions Product Support

team as we help guide customers along their PensionGold journey. You'll gain valuable insights into our support structure, available resources, and how our teams work together behind the scenes, including an overview of Product Development processes and how Base Action Items are applied. Whether you're just starting your trip or have been traveling with PensionGold for years, this session will help you get oriented for the road ahead.

**1-on-1 Meetings** *(Session 26)*

Take advantage of pre-scheduled individual meetings with members of the Management team, Product Support, Product Development, and/or Implementations teams. These sessions offer a valuable opportunity to discuss current challenges, plan for upcoming projects, explore future enhancements, or simply connect with the people helping support your PensionGold journey. Many attendees consider these conversations one of the most valuable stops of the conference.

**11:05 AM – 11:55 AM**

**Navigating the Transition to IRIS** *(Session 5)*

*Presented by Laura Soehlin and Justin Long*

With the IRS rolling out its new IRIS system, this session explores its impact on the 1099-R filing process. We'll recap highlights from our customer webinar in May, share how PensionGold is evolving to support the transition, and answer questions to help you navigate the road to IRIS compliance with confidence.

**Managing the Journey: Correspondence and Document Management (Roundtable Discussion)** *(Session 7)*

*Moderated by Chris Ose and Phil Sporcich*

LRS Retirement Solutions will lead this interactive session focused on electronic document imaging systems. Join the conversation to share experiences, hear best practices from other funds, and explore innovative ways to extend PageCenterX® beyond member documents. Bring your ideas, questions, and stories from the road as we discuss how organizations are modernizing document management processes and reducing paper along the way.

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**11:55 AM – 1:10 PM**

**Lunch**

A buffet lunch will be served in the Ruby Ballroom on the 2<sup>nd</sup> floor.

**1-on-1 Meetings (Session 26)**

Take advantage of pre-scheduled individual meetings with members of the Management team, Product Support, Product Development, and/or Implementations teams.

**1:15 PM – 2:30 PM**

**“Moving Down the Mother Road with PensionGold: Empower Your Plan Members” Customer Panel Discussion (Session 3)**

*Moderated by John Katalinich. Customer Panelists include: Mustafa Miakhail of ACERA and Amy Thibaudeau of AFRF.*

Just like the fun and unique roadside attractions along Old Route 66, this year’s panel discussion has a variety of stops along the way. Hear how public pension funds are approaching Artificial Intelligence, including office policies, day-to-day use, and expectations for business partners. The panel will also discuss how organizations are securely expanding online tools through MemberDirect to better support plan members through important life events. Learn about features added to enhance self-service capabilities and hear real-world experiences balancing convenience with security. Buckle up and join us for the journey.

**2:45 PM – 3:35 PM**

**MemberDirect Version 4: Portal Requests and Online Retirement (Session 12)**

*Presented by Laura Soehnl*

Join us for a demonstration of the new Portal Requests and Online Retirement functionality available in MemberDirect Version 4. See how these features help streamline retirement processes and expand online self-service capabilities as customers continue moving toward a more connected digital experience.

**Expanding PensionGold: Customer Enhancements in Action (Session 9)**

*Presented by Matt Muller and Nolan Groenewold*

The Product Support team will present a variety of customer-requested enhancements that may benefit other pension funds. Highlights include integrations with third-party tools for phone call tracking and recording, PensionGold and Employer collaboration and communication tools, SMS text messaging for member verification as customers continue modernizing their day-to-day operations, and Member portal authorizations and tracking through PensionGold. Join us to see how these enhancements are helping organizations move further down the road of innovation..

**PensionGold Version 2: Ask the Experts (Session 15)**

*Presented by Steven Barnes, Christina Percy, Jaime Miers, and Shannon Rennecker*

Bring your questions, ideas, and feedback to this interactive session focused on PensionGold Version 2. Whether you're curious about existing features, exploring future possibilities, or looking for guidance from others traveling a similar path, this is your opportunity to engage directly with LRS Product Support experts and peers from other pension funds. Share experiences, discuss challenges, and collaborate to help keep your PGv2 journey moving smoothly.

**1-on-1 Meetings (Session 26)**

Take advantage of pre-scheduled individual meetings with members of the Management team, Product Support, Product Development, and/or Implementations teams.

**3:50 PM – 4:40 PM**

**AI Meets PensionGold: From Concept to Reality (Session 14)**

*Presented by Eric Johnson and Justin Long*

Last year during the conference we explored what was possible and this year we’re showcasing AI functionality now in production. Join us for a demonstration of the first developed AI features in Version 4 and see how PensionGold continues driving innovation forward on the road ahead.

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**Expanding Member Portals: Customer Enhancements in Action (Session 10)**

*Presented by Maddy St. Aubin and Alec Welch*

The Product Support team will showcase a range of customer-driven enhancements that could offer value to other pension funds. Highlights include integrations with third-party vendors for enrollment verification, online election capabilities, demographic update tools, and more as organizations continue expanding online services for their members. Hear how customers are adding new features and improving the digital experience for members along the way.

**1-on-1 Meetings (Session 26)**

Take advantage of pre-scheduled individual meetings with members of the Management team, Product Support, Product Development, and/or Implementations teams.

**6:00 PM – 9:00 PM**

**Teaming Conference Reception – Motorheads Bar & Grill, Museum, & Entertainment Complex (Shuttle Bus departs hotel: 5:45)**

Join fellow attendees for an evening of conversation, networking, and fun as we celebrate another day on the PensionGold journey. This relaxed reception is a great opportunity to connect with other customers and the Retirement Solutions team while enjoying the spirit of the Mother Road. Spouses or significant others are welcome to attend.

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**Day 2 – Wednesday, October 7<sup>th</sup> – at Crowne Plaza, Springfield**

**6:00 - 8:30 AM**

**Breakfast at conference hotel – Long 9 Restaurant**

**8:30 AM – 10:50 AM**

**Sharing Ideas and Best Practices (Session 6)**

During this two-hour session, attendees will rotate through a series of interactive discussion tables, each focused on a key topic. Participants will engage in peer-to-peer conversations, exchanging insights and best practices while members of the LRS Retirement Solutions team help guide the discussions. Much like travelers sharing stories along the Mother Road, this session is designed to encourage collaboration, new ideas, and practical takeaways from fellow PensionGold users.

Sample topics include: Training New Staff, Kat & Shawn's Table, Death Auditing Practices, Verifying Members by Phone, How to increase MemberDirect Enrollment, Seminars (in-person or virtual) and calendar integration, Office use of AI, SMS for more than just logins.

**11:05 AM – 12:00 PM**

**Navigating Ad Hoc Reporting Options (Session 8)**

*Presented by Peter Chenoweth and Brendon Brewer*

Semantic models, WynReports, DataDirect, and PowerBI. Confused about ad hoc reporting options? Not sure where to start? Curious about where PensionGold ad hoc reporting is headed? This session will help guide you through the reporting landscape as we demonstrate the different tools in use by PensionGold customers today and take a look at future reporting possibilities down the road. Whether you're just getting started or looking to explore a new route, this session will help point you in the right direction.

**MemberDirect Version 4: Next Steps for Portal Requests (Session 13)**

*Presented by Alex Gregurich and Russ Crifasi*

Building on the Portal Requests framework introduced in the previous session, discover how Beneficiary Designations and Post-Employment Options can be completed online, further expanding the member self-service journey.

**Exploring PensionGold Version 4 (Session 11)**

*Presented by Bryon Ham and Sam Umbanhowar*

Join us for a demonstration of PensionGold Version 4 as we showcase key features, usability improvements, and enhancements designed to support your organization's journey forward. Whether you're already planning your move to PGv4 or simply exploring, this session will help you get familiar with the road ahead.

**1-on-1 Meetings (Session 26)**

Take advantage of pre-scheduled individual meetings with members of the Management team, Product Support, Product Development, and/or Implementations teams. These sessions offer a valuable opportunity to discuss current challenges, plan for upcoming projects, explore future enhancements, or simply connect with the people helping support your PensionGold journey. Many attendees consider these conversations one of the most valuable stops of the conference.

**12:00 PM – 1:15 PM**

**Lunch**

A buffet lunch will be served in the Ruby Ballroom on the 2<sup>nd</sup> floor.

**1-on-1 Meetings (Session 26)**

Take advantage of pre-scheduled individual meetings with members of the Management team, Product Support, Product Development, and/or Implementations teams.

# LRS Retirement Solutions

## PensionGold Teaming Conference

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### Agenda

#### 1:20 PM – 1:50 PM

##### **Mini Session: Understanding the Lifecycle of a PIR** (Session 17)

*Presented by Leah Hardy*

Presented by the Product Support team, this session walks through the full journey of a Problem Incident Request (PIR) from initial submission through the Customer Portal to final deployment in production. Attendees will gain insight into how PIRs are evaluated, moved through environments, documented, and tested through QA processes. Follow the path of a PIR as it travels from idea to implementation along the PensionGold road map.

##### **Mini Session: Tracking Data Changes: Audit, Activity, and History** (Session 18)

*Presented by Laura Campbell and Karlee Kuntzman*

This session explores how PensionGold tracks and presents data changes across the system. We'll look at Audit, Activity, and History features, their intended use cases, and how each supports using the "right tool for the job" when understanding what changed, when, and why. Join us as we navigate the different routes available for researching and reviewing system activity.

##### **Mini Session: Securing PensionGold: Technical Updates and Best Practices** (Session 21)

*Presented by Peter Chenoweth*

Building on previous Teaming Conference sessions centered on PensionGold security, this session delivers technical updates. Example topics include hosting, intrusion testing, SOC 2 compliance, PGSecure, and related security initiatives.

##### **Mini Session: MemberDirect: Seeing Data Differently** (Session 23a)

*Presented by Jeff DeKoker and Laura Soehlin*

Discover new ways MemberDirect presents and organizes information to improve the member experience. This session explores design concepts, usability considerations, and approaches that help users better navigate and understand their data throughout their online experience.

#### 2:05 PM – 2:35 PM

##### **Mini Session: What's New in PageCenterX** (Session 20a)

*Presented by Jake Miller and Phil Sporcich*

Explore the latest features in PageCenterX, including a cleaner login experience with Modern Authentication enabled, drag-and-drop file uploads, sensitive data field masking, and more. See how these enhancements help streamline your imaging workflow and keep your organization moving forward efficiently.

##### **Mini Session: MemberDirect: A Mobile-First Approach** (Session 22a)

*Presented by Joe Katalinich and Wyatt Duiker*

Take a closer look at how we apply mobile-first design in practice. This session covers the principles, trade-offs, and design decisions that guide the creation of intuitive and effective mobile user experiences as more members access services while on the go.

##### **Mini Session: MemberDirect Security Features** (Session 19a)

*Presented by Chris Collins and Peter Chenoweth*

Our Product Support team will highlight essential security features within MemberDirect, from account creation and login to self-service options such as address updates, direct deposit, and withholding changes. Discover how these processes help keep member information secure and protected throughout every step of the online journey.

##### **Mini Session: MemberDirect: Seeing Data Differently** (Session 23b)

*Presented by Jeff DeKoker and Laura Soehlin*

Discover new ways MemberDirect presents and organizes information to improve the member experience. This session explores design concepts, usability considerations, and approaches that help users better navigate and understand their data throughout their online experience.

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**2:50 PM – 3:20 PM**

**Mini Session: What's New in PageCenterX (Session 20b)**

*Presented by Jake Miller and Phil Sporcich*

Explore the latest features in PageCenterX, including a cleaner login experience with Modern Authentication enabled, drag-and-drop file uploads, sensitive data field masking, and more. See how these enhancements help streamline your imaging workflow and keep your organization moving forward efficiently.

**Mini Session: MemberDirect: A Mobile-First Approach (Session 22b)**

*Presented by Joe Katalinich and Wyatt Duiker*

Take a closer look at how we apply mobile-first design in practice. This session covers the principles, trade-offs, and design decisions that guide the creation of intuitive and effective mobile user experiences as more members access services while on the go.

**Mini Session: MemberDirect Security Features (Session 19b)**

*Presented by Chris Collins and Peter Chenoweth*

Our Product Support team will highlight essential security features within MemberDirect, from account creation and login to self-service options such as address updates, direct deposit, and withholding changes. Discover how these processes help keep member information secure and protected throughout every step of the online journey.

**Mini Session: Data Evaluation for PensionGold (Session 24)**

*Presented by Andy DeGroot*

Data quality is a critical mile marker on the road to successful implementation projects, where inaccuracies or gaps can create significant detours. In this session, LRS shares how its experience with system installations and upgrades helps assess data health, identify potential issues early, and keep projects moving in the right direction. Focused on PensionGold Version 3 and Version 4 data, the session highlights approaches for evaluating accuracy, reliability, and usability while uncovering risks, process gaps, and inefficiencies. Attendees will gain insight into how a structured data evaluation can improve decision-making, enhance the user experience, and provide a solid foundation for data cleansing and conversion planning as they continue their journey down the Mother Road.

**3:35 PM – 4:20 PM**

**Closing Session: Wrap-Up and Reflections (Session 25)**

*Presented by Dan McCain and Shawn Farris*

Join us late Wednesday afternoon as we conclude the formal portion of the PensionGold Teaming Conference. In this final session, we'll reflect on key takeaways, share thoughts on this year's event, and gather your feedback to help shape future conferences. We'll also collect completed evaluation surveys and announce the winners of the Team Challenge. Before we reach the end of the road, join us one last time to celebrate the journey and look ahead to what's next.

*(See the next page for the Day 3 Optional Sessions)*

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**Day 3 – Thursday, October 8<sup>th</sup> (optional) – at Crowne Plaza, Springfield**

**6:00 - 8:30 AM**

**Breakfast at conference hotel – Long 9 Restaurant**

**8:30 AM – 9:15 AM**

**PowerBI Questions and Use Cases (Session 29)**

*Presented by Peter Chenoweth and Brendon Brewer*

Bring your questions and suggestions as our Database Administrator and Product Support team help explore PowerBI use cases within your environment. This interactive session is a great opportunity to discuss ideas, reporting needs, and practical applications.

**Online Retirement in Action (Session 28)**

*Presented by Maddy St. Aubin and Chris Collins*

Join the Product Support team for a closer look at MemberDirect v3 Online Retirement Processing customizations currently in production environments. Hear how customers are using this feature and participate in an open discussion with questions and shared experiences.

**1-on-1 Meetings (Session 26)**

Take advantage of pre-scheduled individual meetings with members of the Management team, Product Support, Product Development, and/or Implementations teams.

**9:30 AM – 10:15 AM**

**Wyn Reporting: Questions and Use Cases (Session 30)**

*Presented by Peter Chenoweth and Phil Sporcich*

Bring your questions and suggestions as our Database Administrator and Product Support team discuss Wyn Reporting and how it can be used within your environment. Explore reporting ideas, use cases, and opportunities with our experts.

**Understanding Disaster Recovery and PGSecure (Session 33)**

*Presented by Aaron Bessie and Matt Muller*

Join our team for an open discussion on LRS Hosting, Disaster Recovery, and PGSecure services. Learn how these solutions work together and ask questions about planning, preparedness, and business continuity.

**Cruising into PGv4: Migration Insights for PGv2 and PGv3 Customers (Session 27)**

*Presented by Sam Umbanhowar and Steven Barnes*

Join the Implementations team as they share experiences and key takeaways from customer migrations from PensionGold Version 2 or 3 to Version 4. Hear lessons learned, common challenges, and practical guidance to help prepare for your own journey. Bring your questions for this interactive discussion.

**1-on-1 Meetings (Session 26)**

Take advantage of pre-scheduled individual meetings with members of the Management team, Product Support, Product Development, and/or Implementations teams.

**10:30 AM – 11:15 AM**

**DataDirect Reporting: Questions and Use Cases (Session 31)**

*Presented by Peter Chenoweth and Karlee Kuntzman*

Bring your questions and suggestions as our Database Administrator and Product Support team discuss DataDirect use cases and reporting scenarios within your environment. Learn more about how DataDirect can support your reporting needs.

**Template Editor: Tips, Tricks, and Q&A (Session 32)**

*Presented by Troy Higginbotham and Miles Wilson*

Join the Product Support team as we demonstrate helpful Template Editor tips and techniques. We'll also leave plenty of time for questions and discussion to help you get the most from Template Editor.

**1-on-1 Meetings (Session 26)**

Take advantage of pre-scheduled individual meetings with members of the Management team, Product Support, Product Development, and/or Implementations teams.