



PENSIONGOLD[®]

TEAMING CONFERENCE



2019





Welcome

Welcome!

Thank you for attending the 2019 PensionGold® Teaming Conference. Join us as we take a pause to recognize and celebrate 40 successful years for LRS. While we might take a moment to honor our past, we haven't stopped preparing PensionGold and you, our customers, for a great future. If you attended last year's conference, you will notice this year our former construction zone is now a modern, state-of-the-art office complex. We are very excited to share it with all of you.

Our goal year after year is to make the Teaming Conference valuable for everyone, whether you are a regular, occasional, or new attendee and whether you have an older version of PensionGold or our newest version. That means providing you with the latest information on our software products, relevant technical developments, and other information pertinent to our customers. To learn what great topics we will present at this year's conference, check out the agenda on our mobile app (<https://guidebook.com/g/2019pgtc>; passphrase = pgold23) -- or locate the 2019 PensionGold Teaming Conference program book in PDF form at <https://www.lrsretirementsolutions.com/Teaming-Conference-login> (username = teaming; password = pgold23).

We are excited to have Patti Wood back as our guest speaker! If you attended our 2011 conference, you may recall her entertaining and informative presentation on "First Impressions". Called the "Gold Standard of Body Language Experts" by the *Washington Post*, Patti Wood is an international speaker, trainer, researcher, and author of nine books. She is recognized as a nonverbal communication and human behavior expert and interviewed by media outlets around the globe to render her opinion on the body language of celebrities and public figures. This year, Patti will share her expertise related to "Communication that Transforms".

Regarding this year's schedule, we decided to use a shortened schedule just as we have the last couple years (given that we received great feedback on this format). We've packed several sessions into 2½ days which allows us to wrap up the conference by Noon on Thursday while still providing you the same amount of content! We hope that wrapping up by mid-day Thursday will allow you to travel back home by Thursday evening, if needed. If you are in no hurry to leave, don't hesitate to stick around and enjoy some of our historic sites or local restaurants.

The opportunity for you to meet and interact with our team members face-to-face and chat with your peers is one of the key benefits of our conference. While you are here, please plan to join us for the evening events, which provide networking opportunities with your peers in a casual setting. On Tuesday evening, we have planned a special dinner at *Augie's Front Burner*, an upscale restaurant serving gourmet American fare in a colorful setting in downtown Springfield. On Wednesday night, you can kick back and relax at our reception at the *Ace Sign Company Museum*! Of course, we will be "partying like it's 1979" under a disco ball, maybe firing up a game of Trivial Pursuit, or just jamming to a Sony Walkman. Most certainly, we are looking forward to an all-around good time with great information to share!

As you mingle with our LRS Retirement Solutions team during the sessions, breaks and evening events, you will likely see many familiar faces and several new ones. We once again added several people to our team as we prepare for the next 40 years. Every member of our team is here to help you learn more about PensionGold! We encourage fresh ideas, enthusiasm, a new perspective, and a willingness to challenge the status quo -- all qualities needed to keep improving.

Every year, we look forward to seeing each of you at the conference and spending valuable time together. Don't hesitate to offer us your suggestions for improving the conference.

Thank you for choosing LRS, our PensionGold products, and for joining us at the 23rd PensionGold Teaming Conference!

Tom
Tom Chesser

"HONORING OUR PAST...PREPARING FOR YOUR FUTURE!"

Featured Speaker

Patti Wood

Reach Out—Communication that Transforms



Called the “gold standard of body language experts” by the *Washington Post*, Patti Wood is an international speaker, trainer, researcher, and author of nine books, including *Snap: Making the Most of First Impressions*, *Body Language and Charisma*. She is recognized as a nonverbal communication and human behavior expert and interviewed by media outlets around the globe to render her opinion on the body language of celebrities and public figures. And this year Patti Wood will be speaking about body language and communication at the 23rd Annual PensionGold Teaming Conference.

When was the last time you had a conversation that affected you profoundly? What are you saying to people that can influence them in a positive way? Do you feel that people are paying attention to what you have to say?

In this motivational program, rich with stories, tears, and laughter, Patti Wood will explain ways to transform your communications to help you:

- establish meaningful rapport
- uncover commonalities that connect
- discover what makes each person unique
- learn methods to be more receptive and open to others

Time Magazine recognized her nonverbal communication course at FSU as one of the top college courses in the country. Her programs are described as dynamic, high-energy, powerful, and very funny. You will not want to miss out on Patti Wood’s insightful presentation at the PensionGold Teaming Conference this year.

Customer Presenters



Amy Adams is the Executive Director for The General Retirement System for Employees of Jefferson County, Alabama (GRS), which serves approximately 2,600 active members and 2,300 retired members. Prior to joining GRS as Executive Director in 2015,

Amy was a partner in a local public accounting firm which served as the auditor of record for GRS. GRS went live with PensionGold® January of 2018. Ms. Adams has a Bachelor of Science in Business and a Master of Accountancy from the University of Alabama. She is also a Certified Public Accountant.



Rebekah Bardakos joined the Santa Barbara County Employees' Retirement System team in 2016 and is delighted to serve as the SBCERS Member Services Director, overseeing benefits for approximately 10,000 members and 11 Plan Sponsors.

She is a UC Santa Barbara graduate with a degree in Spanish and Latin American Iberian Studies and a certified Wiley DiSC Facilitator. Prior to joining SBCERS, she worked for 18 years at the Santa Barbara Superior Court, where she served as a Financial Analyst and implemented the Court payroll system as the Payroll Manager for 10 years. Rebekah is a founding member of the local chapter of the American Payroll Association, serving as its first president in 2007 and again in 2015. All things payroll and benefits are familiar and enjoyable territory for her. She feels privileged to serve retirees and take care of the people who spent their career taking care of the community.



Scott Steventon currently serves as the Acting Director of Retirement for the City of Phoenix Employees' Retirement System (COPERS). Prior to that, he served as the Deputy Director and Operations Manager. Scott is responsible for the effective and

efficient administration of retirement benefits for over 22,000 civilian and public safety employees and retirees, including an administrative and investment budget of over \$18 million and an investment portfolio of over \$2.5 billion. With over 23 years of government service, Scott spent 17 years with the Phoenix Police Department in a number of different positions, completing his time as a state and federal grants program manager. He also spent several years as a capital bond programs manager building cultural facilities for non-profit organizations that provide programs and services to residents and visitors to the Valley of the Sun. Scott holds a Bachelor of Science and Masters of Public Administration from Grand Canyon University.



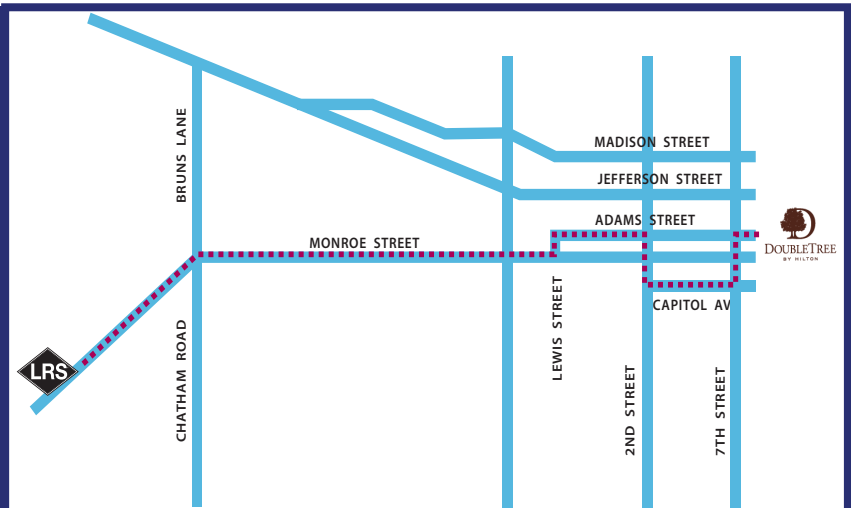
Julie West is the Communications Specialist for the Missouri Department of Transportation and Highway Patrol Employees' Retirement System (MPERS). She reports directly to the Assistant Executive

Director and is responsible for the development and implementation of digital media including, but not limited to, MPERS' website, social media platforms, publications, and multimedia educational content. Additionally, she serves as a backup Benefit Specialist as needed. Julie has nine years of experience with State of Missouri employee benefits, which began with the Missouri Department of Corrections. In 2018, she came to MPERS from Missouri Consolidated Health Care Plan (MCHCP) where she was a Member Education Specialist for the western region of the state. During her time at MCHCP, she earned her Missouri Life and Health Insurance Producers License. Julie holds a Bachelor of Arts in communication arts from Hannibal-LaGrange University and a Masters of Arts in speech communication from the University of Central Missouri.

Maps & Shuttle

HOTEL TO LRS CAMPUS

1. Go West on E. Adams toward S. 7th
2. Turn left at S. 7th St.
3. Turn right at E. Capitol Ave.
4. Turn right at S. 2nd St.
5. Turn left at E. Adams St.
6. Turn left at S. Lewis St.
7. Turn right at W. Monroe St.
8. LRS on right at 2401 W. Monroe St.
9. Park near Bldg. 6, and follow the sidewalk to Bldg. 5



SHUTTLE SCHEDULE

TUESDAY 9/17: DoubleTree - President Abraham Lincoln Hotel Departures 7:15 am and 7:45 am;
Return to the hotel 15 and 45 minutes after last session.

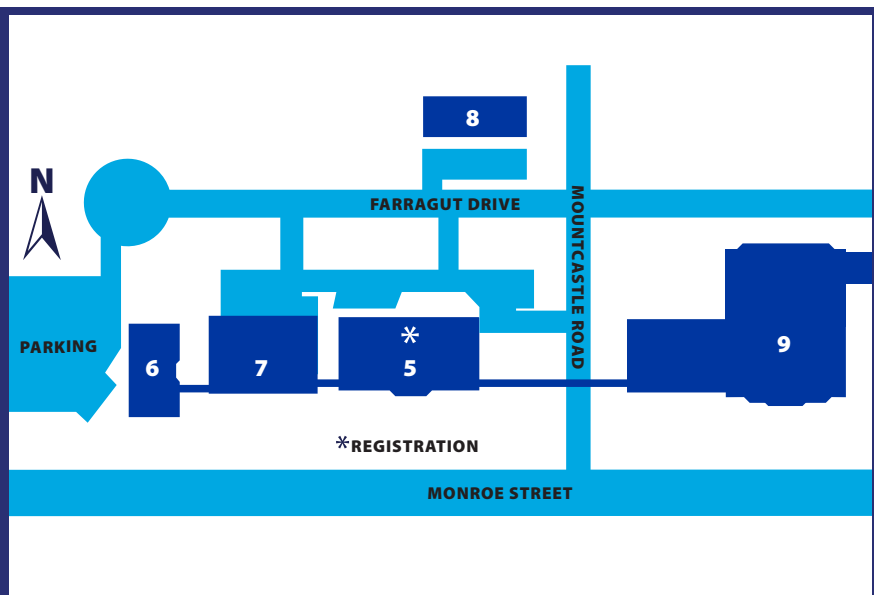
WEDNESDAY 9/18: DoubleTree - President Abraham Lincoln Hotel Departures 7:15 am and 7:45 am;
Return to the hotel 15 and 45 minutes after last session.

THURSDAY 9/19: DoubleTree - President Abraham Lincoln Hotel Departures 7:15 am, 7:45 am and 8:00 am;
Return to the hotel 15 and 45 minutes after last session.

LRS CAMPUS

Parking at the LRS Campus

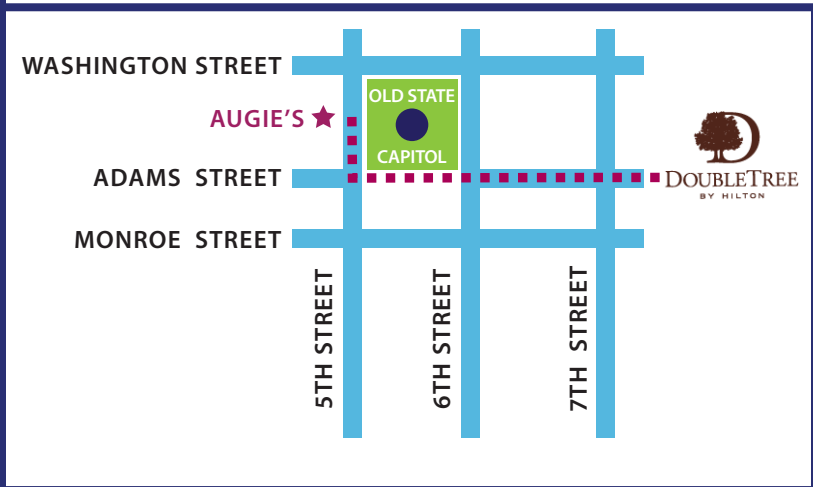
If you drive to the LRS campus versus taking our shuttle from the hotel, please park at 2451 W. Monroe Street (watch for our PensionGold Teaming Conference parking signs). This is the surface parking lot just outside of LRS Building 6. Note that conference registration and check-in is located in LRS Building 5 at 2401 W. Monroe Street (a short 3-minute walk from the parking lot).



Maps & Shuttle

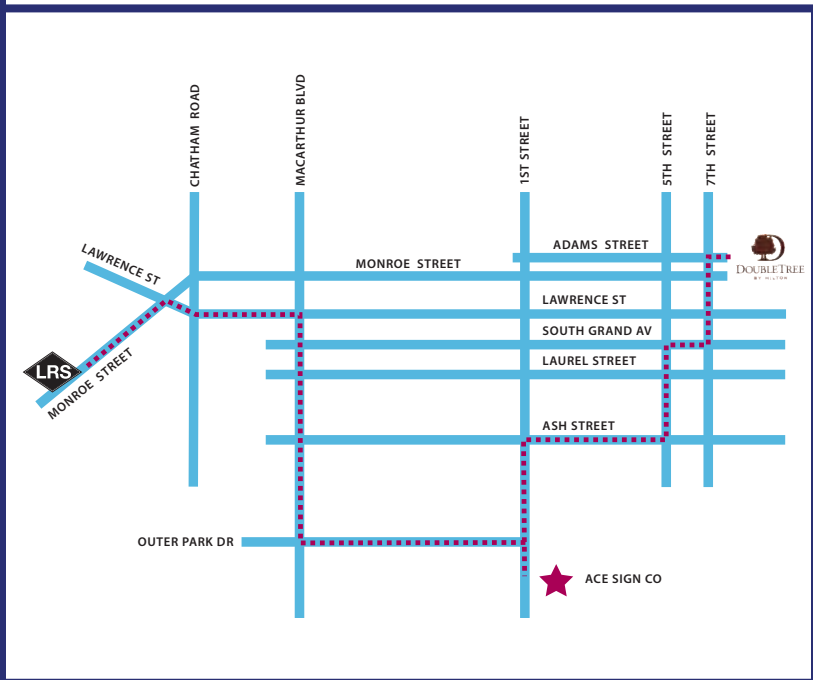
TO AUGIE'S FRONT BURNER

1. Walking from DoubleTree - President Abraham Lincoln Hotel, proceed WEST on Adams to 5th Street.
2. Cross 5th Street
3. Turn RIGHT and proceed NORTH on 5th Street
4. Augie's Front Burner is ahead on your LEFT.



TO ACE SIGN COMPANY

1. From the DoubleTree - President Abraham Lincoln Hotel, proceed SOUTH on 7th Street.
2. Follow 7th Street SOUTH to South Grand Ave
3. Turn RIGHT onto South Grand and follow to 5th Street
4. Turn LEFT onto 5th Street, and follow to Ash Street
5. Turn RIGHT onto Ash Street and follow to 1st Street
6. Turn LEFT onto 1st Street and follow to ACE Sign Company at 2540 S. 1st Street



CONTACTS

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217-836-2937

John Katalinich
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Todd Kennedy
217-725-1142

LRS (Julie Milner)
217-793-3800, ext. 1851

Dan McCain
217-725-2127

Jeff Proffitt
217-381-2860

Phil Sporchich
217-260-1578

Steve Mortimer (Shuttle)
217-793-3800, ext. 1558

Lincoln Yellow Cab
217-523-4545

DoubleTree - President Abraham Lincoln Hotel
217-544-8800

Conference Sessions

Breakfast, Lunches & Breaks

Hunger and thirst can keep you from learning, so we want to take care of both. You are welcome to start your morning with a hot breakfast at the LRS Campus, in the Building 5 Atrium. Throughout the day you'll find snacks and beverages at locations near the sessions. Daily lunches will also be served in the Building 5 Atrium with seating in the Auditorium and the Atrium.

Shuttles

For those of you who need a way to get to the LRS Campus from the conference hotel, we provide a shuttle van that will run between the LRS Campus and the DoubleTree - President Abraham Lincoln Hotel. There are scheduled pickups and drop-offs in the mornings (see Pg. 4) and afternoons for each day of the conference. You can locate the shuttle outside the main entrance at the hotel and outside Buildings 5 and 6 on the LRS campus. Jump on the shuttle if you need a ride; seats are available on a first come, first served basis.

Give the shuttle drivers a call if you need to be picked up or dropped off at the hotel outside of the scheduled times.

Internet Café

For an easy way to stay informed of what's going on back at the office during your time at the PensionGold Teaming Conference, feel free to use the Internet Cafe located just outside the Auditorium in the Building 5 Atrium. The Internet Cafe offers access to the web for whatever you need, including printing your airline boarding pass. WiFi is also available in the LRS buildings; join the "LRSGuest" network - no password is required.

Format

The PensionGold Teaming Conference sessions consist of a variety of formats to help you gain information during your time here. Each day offers General Sessions and product specific sessions. You will also find hands-on labs, and you may attend 1-on-1 meetings, too. Feel free to attend any session you choose. Please keep in mind that seating capacity is limited in some sessions.

Team Challenge

During the 2019 PensionGold Teaming Conference, each conference attendee will be assigned to a team. The teams are in competition to win awards which will be presented at Thursday's Closing Session. Most of the activities related to the Team Challenge are focused on this year's theme: the 40th Anniversary of LRS / *"Honoring our past ... Preparing for your future."* Our goal is to create more opportunity for interaction between our attendees and have a little fun at the same time. It's a Teaming Conference tradition!

Conference Sessions

TUESDAY • SEPTEMBER 17

7:30 AM – 8:30 AM

Registration Check-In and Breakfast at LRS

8:30 AM – 10:10 AM

Welcome and Introductions (Session 1)

Welcome to the 23rd Annual PensionGold Teaming Conference! We will include a roll-call introduction of customers this year and introduce some key members of the LRS Retirement Solutions group. Other topics to be covered include some of the latest happenings in the LRS Retirement Solutions group, along with future plans and direction. There will also be a brief overview of the conference agenda, highlighting our guest speaker, an overview of this year's conference theme, and details of this year's Team Challenge. Towards the end of the Welcome Session, attendees will break into small groups and get the chance to "put a name with a face" for the many Retirement Solutions Product Support team members as well as providing an opportunity to get acquainted with their fellow conference participants.

10:30 AM – 11:30 AM

Product Update – Version 3 (Session 18)

Join the Product Research and Development team for a review of recent and planned development activities with PensionGold Version 3.

Product Update - Version 2 (Session 13)

In this session, our Product Support team will review the recent development activities with PensionGold Version 2 and the status of where customers are at in taking the latest release. This session will include an overview of where we will be focusing our attention for future improvements and enhancements to the Version 2 product and Web Member Services.

Product Update - Version 1 (Session 10)

In this session, our Product Support team will provide an overview of the recent development activities focused on technology changes that we continue to test in an effort to ensure that PensionGold Version 1 can continue to be supported as technology changes.

11:30 AM – 12:45 PM

Lunch

A buffet lunch will be served. Seating will be available in the Auditorium and Atrium area.

12:15 PM – 12:35 PM

Campus Tour (Session 9a)

Sign up for a 20-minute walking tour of the LRS campus. This guided tour will allow attendees to see our latest building additions and will provide a brief overview of the other divisions within the company.

Conference Sessions

12:45 PM – 2:00 PM

“A Day in the Life - It’s not just PensionGold” (Panel Discussion) (Session 2)

We realize using PensionGold to perform benefit calculations and process payroll is just part of what you do. This panel discussion will explore member communications/outreach as well as how customers measure the effectiveness of their various member communications strategies and specific processes. Topics range from maintaining consistent broadcast messages, use of social media and member portal, and programs and events, to response time for member questions and timely processing of a retirement benefit, disability, refund, etc.

2:15 PM – 3:15 PM

Retirement Solutions 101 (Session 3)

Are you a first-time attendee? Are you a new user of PensionGold software or maybe in the middle of an implementation project? If you answered yes to any of these questions or would like to explore the Who, What, Why, and How of the Retirement Solutions Product Support team, plan to attend this informative session.

PensionGold Does That? – Version 3 (Session 19)

Have you ever wondered if you’re getting all the value out of your PensionGold software? Often, we find there are features and functionality that are available in our products, but some of our customers don’t realize they exist. This session will provide an overview of some of the most commonly unknown features and functionality available in the products. Come find out what you didn’t know so you couldn’t ask, tips for using the product, or even ways to be more efficient in your daily activities.

PensionGold Does That? – Version 2 (Session 14)

Have you ever wondered if you are getting all the value out of your PensionGold software? Often, we find there are features and functionality that are available in our products, but some of our customers don’t realize they exist. This session will provide an overview of some of the most commonly unknown features and functionality available in the products. Come to this session to find out what you didn’t know so you couldn’t ask, tips for using the product, or even ways to be more efficient in your daily activities.

PensionGold Version 1 Product Lab (Session 11)

In this session, customers who may be novices at using their PensionGold Version 1 software will have the opportunity to get “hands on” with our Version 1 software, with the assistance of our Product Support team. They will help you understand how to get the most out of the product. They will also be able to share examples of “best practices” to follow when working with the PensionGold Version 1 software. If you are new to your retirement system or are not an accomplished PensionGold Version 1 user, you will find this session beneficial.

3:30 PM – 4:30 PM

ActiveReports Server (ARS) – Ad Hoc Reporting – Version 3 (Session 24)

Are you curious about self-service reporting within PensionGold Version 3? Join us for a conversation on the state of business intelligence within PensionGold Version 3 and an in-depth demonstration of our Ad Hoc solution, ActiveReports Server (ARS). We’ll show you just how easy it can be to empower your team with data. We will also take a sneak-peek at WynEnterprise, the next generation of ARS that brings exciting new possibilities to our Ad Hoc solution.

Conference Sessions

3:30 PM – 4:30 PM

PensionGold Show and Tell – Version 3 (Session 21)

Over the past few years, our Product Research and Development team has released a significant amount of new and improved PensionGold Version 3 functionality. The product's core business functionality has also been expanded to support customer needs and improve customer service, productivity, and efficiency. Join us as we show and tell you how these changes can benefit your retirement system.

Web Member Services Show and Tell – Version 2 (Session 15)

Over the past couple of years, our Version 2 team has developed several new security enhancements and functionality in Web Member Services (WMS). Examples include requiring a PIN (personal identification number) and reCAPTCHA validation during account creation, forcing occasional user password updates, storing Trusted Devices, and sending a Welcome to WMS letter to new users. In addition, administrative reports are now available that provide various statistics on WMS actions such as accounts created, logins, failed logins, password changes, password requests, and benefit estimates generated. Join us as we show and tell you how these changes can enhance your WMS application and security.

PensionGold Version 1 Product Lab (continued)

Please refer to session description listed for 2:15 PM.

6:00 PM – 9:00 PM

Teaming Conference Dinner – Augie's Front Burner, Springfield

Join your fellow attendees and the LRS Retirement Solutions team for cocktails and a sit-down dinner at Augie's Front Burner, an upscale restaurant serving American fare in a colorful setting. The evening will begin with cocktails and appetizers and follow with dinner at this establishment located in historic downtown Springfield.

Casual attire is appropriate. Spouses or significant others are welcome to attend.

Conference Sessions

WEDNESDAY • SEPTEMBER 18

7:30 AM – 8:30 AM

Breakfast at LRS

8:30 AM – 9:30 AM

Customer Product Suggestions – Version 3 (Session 22)

This session has been reserved to give conference attendees an opportunity to provide feedback regarding the PensionGold Version 3 product and services. This session will provide a forum for customers to present ideas, suggestions, or requests for product features and enhancements that may not already be planned for inclusion in a future release. Customers are encouraged to create their list of ideas and suggestions in advance and bring it with them to the session for discussion.

Customer Product Suggestions – Version 2 (Session 16)

This session has been reserved to provide conference attendees an opportunity to provide feedback regarding the PensionGold Version 2 product and services. This session will also provide a forum for customers to present ideas, suggestions, or requests for product features and enhancements that may or may not already be planned for inclusion in a future PensionGold Version 2 base release.

Customer Product Suggestions – Version 1 (Session 12)

In this session, the Version 1 Product Support team will solicit suggestions from the customers on what features they would like to see added to the Version 1 product. Many enhancements have been made to the other product versions that might be of interest to existing Version 1 customers. Customers are encouraged to create their list of ideas and suggestions and bring it with them to the conference for discussion with the Version 1 Product Support team.

9:50 AM – 11:45 AM

Guest Speaker – Patti Wood (Session 4)

Called the “Gold Standard of Body Language Experts” by the *Washington Post*, Patti Wood is an international speaker, trainer, researcher, and author of nine books. She is recognized as a nonverbal communication and human behavior expert and interviewed by media outlets around the globe to render her opinion on the body language of celebrities and public figures. And this year Patti Wood will be speaking about body language and communication at the 23rd Annual PensionGold Teaming Conference.

11:45 AM – 12:45 PM

Lunch

A buffet lunch will be served. Seating will be available in the Auditorium and the Atrium area.

12:15 PM – 12:35 PM

Campus Tour (Session 9b)

Sign up for a 20-minute walking tour of the LRS campus. This guided tour will allow attendees to see our latest building additions and will provide a brief overview of the other divisions within the company.

Conference Sessions

12:45 PM – 3:00 PM

Roundtable Discussions (Session 5)

Attendees will have an opportunity to join several tables during this 2+ hour session. At each table, they will have the opportunity to participate in interactive discussions on a variety of topics with their peers and members of the Retirement Solutions team. A sample list of topics includes BCP/Disaster Recovery, Server (database) Upgrade Strategies, Vulnerability Scanning, Imaging/Barcoding/Scanning, Safeguarding PII, Member Servicing, and Data Visualization.

3:15 PM – 4:15 PM

PensionGold Product Lab (Session 23)

Are you curious about enhancements to the PensionGold products? Are you a Version 1 or Version 2 customer and want to learn more about Version 3? This is your chance to get hands-on experience. Workstations have been set up so you can get a first-hand view of the new functionality. Take some time to explore PensionGold Version 2 or PensionGold Version 3. We will have members of our Product Research and Development team and our Product Support team on hand and available to assist you and answer your questions. If you have questions or need help learning about any PensionGold features, use the lab time to explore the product with your favorite Retirement Solutions staff member.

3:15 PM – 3:35 PM

Campus Tour (Session 9c)

Sign up for a 20-minute walking tour of the LRS campus. This guided tour will allow attendees to see our latest building additions and will provide a brief overview of the other divisions within the company.

3:15 PM – 4:15 PM

1-on-1 Meetings (Session 25)

Attend pre-scheduled meetings with Management, your Product Support team, the Product Research and Development team, and/or our Infrastructure team. Many attendees find these individual meetings beneficial as they get to know the Retirement Solutions Team, plan for future projects, troubleshoot existing issues, or get hands-on with new product features and releases.

6:00 PM – 9:00 PM (Shuttle departs hotel: 5:45 and 6:00)

Teaming Conference Reception – Ace Sign Company Museum

Join your fellow attendees and the LRS Retirement Solutions team for a fun and relaxing time as you build relationships with your industry peers and Retirement Solutions team members at the Ace Sign Company Museum, a historic attraction displaying over 85 vintage signs from Springfield and Route 66. You'll be able to "Get your kicks on Route 66" – while enjoying great food and cold beverages – and can even take part in an optional tour of the sign production facility.

Casual attire is appropriate. Spouses or significant others are welcome to attend at no additional cost.

Schedule

TUESDAY, SEPTEMBER 17

ROOM	ROOM SIZE	8:30-10:10	10:30-11:30	11:30-12:45	12:45-2:00	2:15-3:15	3:30-4:30	6:00-9:00
Building 9 Classroom 307 (Access via Building 5)	84	#1 Welcome Session						Teaming Conference Dinner Augie's Front Burner
Building 6 Classroom 1 (LAB)	14					#3 Retirement Solutions 101	#24 ActiveReports Server (ARS)- Ad Hoc Reporting	
Building 6 Classroom 5 (LAB)	9		#10 Product Update			#11 Product Lab		
Building 6 Classroom 7	35					#19 PensionGold Does That?		
Building 6 Classroom 8	35		#13 Product Update			#14 PensionGold Does That?	#15 Web Member Services - Show & Tell	
Building 5 Registration Desk				12:15 #9a Campus Tour				
Building 5 Atrium				Lunch				
Building 5 Auditorium	46+		#18 Product Update		#2 "A Day in the Life - It's not just PensionGold" (Panel Discussion)		#21 PensionGold Show & Tell	

KEY

- VERSION 1
- VERSION 2 & ADV
- VERSION 3
- V1, V2, ADV, V3
- GENERAL SESSIONS
- MEALS

Schedule

WEDNESDAY, SEPTEMBER 18

ROOM	ROOM SIZE	8:30-9:30	9:50-11:45	11:45-12:45	12:45-3:00	3:15-4:15	6:00-9:00
Building 9 Classroom 307 (Access via Building 5)	84		#4 Patti Wood (Guest Speaker)				Teaming Conference Reception Ace Sign Company
Building 6 Classroom 1 (LAB)	14					#23 Product Lab	
Building 6 Classroom 5 (LAB)	9	#12 Product Suggestions Roundtable					
Building 6 Classroom 7	35					#25 1-on-1 Meetings	
Building 6 Classroom 8	35	#16 Product Suggestions Roundtable				#25 1-on-1 Meetings	
Building 5 Registration Desk				12:15 • #9B Campus Tour		3:15 • #9C Campus Tour	
Building 5 Atrium				Lunch			
Building 5 Auditorium	46+	#22 Product Suggestions Roundtable			#5 Roundtable Discussions	#25 1-on-1 Meetings	

KEY

- VERSION 1
- VERSION 2 & ADV
- VERSION 3
- V1, V2, ADV, V3
- GENERAL SESSIONS
- MEALS

Schedule

THURSDAY, SEPTEMBER 19

ROOM	ROOM SIZE	8:30-9:30	9:45-10:45	11:00-11:45	11:45-12:30
Building 9 Classroom 307 (Access via Building 5)	84				
Building 6 Classroom 1 (LAB)	14		#20 Template Editor		
Building 6 Classroom 5 (LAB)	9				
Building 6 Classroom 7	35		#7 Microsoft Excel Tips & Tricks		
Building 6 Classroom 8	35		#8 Foundations for Security		
Building 5 Registration Desk					
Building 5 Atrium					Box Lunches Available (ordered in advance)
Building 5 Auditorium	46+	#6 Customer Led Session		#26 Closing Session	

KEY

- VERSION 1
- VERSION 2 & ADV
- VERSION 3
- V1, V2, ADV, V3
- GENERAL SESSIONS
- MEALS

Conference Sessions

THURSDAY • SEPTEMBER 19

7:30 AM – 8:30 AM

Breakfast at LRS

8:30 AM – 9:30 AM

PensionGold Customer Led Session (Session 6)

This session has been reserved for our attendees to use for open general discussion. Topics can range from industry information and legal trends to general technology items, etc. Generally, one or two customer attendees are selected prior to the conference to host and lead this popular session.

9:45 AM – 10:45 AM

Foundations for Security (Session 8)

Within Information Technology, security threats are ever present. This session will present a framework to build a core foundation for a secure environment, including a “Top 10” list of key areas. It will conclude with a discussion and checklist that outlines steps to ensure proper security measures are in place.

Microsoft Excel Tips and Tricks (Session 7)

Increasingly, large amounts of data from PensionGold are being imported into Excel on a regular basis. This session will demonstrate several powerful time-saving shortcuts to work with this data efficiently and accurately.

Template Editor – Version 3 (Session 20)

Are you new to working with correspondence templates in PensionGold Version 3? Or, do you simply need a refresher? This session will get you up to speed on using the Template Editor and its newest features.

11:00 AM – 11:45 AM

Closing Session(Session 26)

We will wrap up our 23rd PensionGold Teaming Conference with a final session, before Noon on Thursday. During this session, we will summarize our thoughts and views on this year’s conference and collect feedback from the attendees on how to improve the PensionGold Teaming Conference in future years. In addition, we will collect the overall conference evaluation surveys. We will also announce the winners of the Team Challenge and award prizes to those in attendance.

11:45 AM – 12:30 PM

Box Lunches Available

Pre-ordered box lunches will be available. Seating will be available in the Auditorium and the Atrium area.

Presenters

Steven Barnes is a Senior Product Support Developer on the Product Support team. He provides technical support and solutions for several PensionGold Version 2 customers, including but not limited to New Hampshire Retirement System, Alameda County Employees' Retirement Association, and Shelby County Retirement System. Steven began work with LRS as a consultant in March 1997 and transferred to LRS Retirement Solutions in April 2006.

Robert Blythe is a Senior Product Support Developer in Product Support responsible for the day-to-day support and customization requests for three PensionGold Version 1 customers. He is also involved in Version 2 support both as a developer and analyst. He has been with LRS since 1998 and also supports the funds that continue to use the "great-grandfather" of PensionGold, a pension administration product called PensionPlus® which is designed for downstate Illinois police and fire pension funds. Prior to joining Retirement Solutions, Bob worked for Dobson Pipe Organ Builders of Iowa, Memorial Health System of Illinois, and Bank One.

Nancy Braker is currently a Business Analyst on the Product Support Team for San Bernardino County Employees' Retirement Association (SBCERA). Nancy previously worked in LRS Retirement Solutions for 10 years, then returned in May 2015 to work with PensionGold Version 3 Product Support customers. She was involved in several implementation projects prior to moving to Product Support. Prior to working at LRS, Nancy worked for five years at the Illinois Teachers' Retirement System and two years creating budgets for the Governor of Illinois. Just prior to returning to LRS in 2015, she worked as a consultant at Illinois State Employees' Retirement System. She is a registered CPA in the State of Illinois.

Peter Chenoweth is a Microsoft Certified Solutions Expert for Data Platform, Database Administrator, and Information Security Officer for the LRS Retirement Solutions group. He helps provide data solutions and support for all project teams throughout the division to help ensure reliable, efficient, and secure data experiences for all PensionGold customers. Prior to joining the LRS family in March 2013, Peter was employed by Bound To Stay Bound Books in Jacksonville, IL, for 12 years where he was a software developer and database administrator.

Tom Chesser is a Vice President of LRS and leads the LRS Retirement Solutions division. He is a certified Project Management Professional and has 30+ years of experience working with technology in both the public and private sectors. Tom has held several positions during his years at LRS including Project Manager, Senior Manager – Implementations, and Senior Manager – Product Support. Currently, Tom oversees all day-to-day sales and operations (administration, product research & development, implementations, and product support) related to our PensionGold products and services. Tom reports to Dick Levi, President/CEO, and is ultimately responsible for the division's overall success.

Mike Chestnut is a Technical Leader in the Infrastructure and Technical Services (ITS) group and has been with LRS for 13.5 years. Prior to joining Retirement Solutions, Mike was a member of the LRS Consulting Services group. Mike's primary role is leading the ITS group. The ITS group is responsible for Hosted environments, PG Secure (BCP) environments as well as the Imaging implementations. Mike also assists the Implementations, Product Research & Development, and Product Support teams with infrastructure and technical requirements including server/environment management and daily support. Mike is a Microsoft Certified Systems Engineer and has over 25 years of experience in the IT industry.

Presenters

Kelly Cummings is in her second year at LRS Education Services, serving as the Productivity Instructor teaching both Microsoft and Adobe products. Kelly spent 10 years teaching business courses in the public education sector in Virginia before returning to her home state of Illinois in 2010. Prior to joining LRS, she served as a Business Teacher in two central Illinois high schools.

Kelly also has several years of experience in both management and marketing in the shopping center industry, including positions in Georgia, Florida, South Carolina, Virginia, and Wisconsin.

Trevor Donahue is a Software Developer for the LRS Retirement Solutions Product Support team and works with PensionGold Version 3 customers. He holds a B.S. in Mathematics and Computer Science from Illinois College in Jacksonville, IL. He joined LRS in April 2018. Prior to joining LRS, Trevor worked for Crop Risk Services in Decatur, Illinois where he worked as a Software Developer for three years.

Sheila Goldsberry is a Senior Business Analyst who has been in LRS Retirement Solutions since 2006. Although she began in Version 2 Product Support, she is now working with PensionGold Version 3 customers on the Product Support team. Prior to coming to LRS, Sheila worked for Horace Mann Service Corporation as a Compensation and Workforce Analyst.

Leah Hardy is a Business Analyst for the Product Support Team and works with PensionGold Version 3 customers. Leah has been with LRS Retirement Solutions since 2012 and was previously on the Implementations Team. Prior to coming to Retirement Solutions, Leah worked on the Web Solutions Team within LRS.

Shiela Hemberger is a Product Support Specialist on the Product Support team, responsible for the day-to-day support and customization requests of PensionGold Version 2 customers. She has participated in requirements gathering, design, testing, and support for the Version 2 customers. She has been with LRS since 1998. Prior to joining LRS Retirement Solutions in 2007, Shiela worked in the Corporate Recruiting Division at LRS. Prior to joining LRS, Shiela worked in human resources and as a clinical medical researcher.

Troy Higginbotham is a Software Developer who has been with LRS Retirement Solutions since 2006 where he started with the Implementations Team. In 2010, he made the move to Product Support where he currently works with PensionGold Version 3 customers. Troy joined LRS in 1992. For the first 14 years with LRS, he worked as an IT consultant supporting customers who use mainframe, midrange, and business intelligence applications.

Megan Holzmacher is a Senior Business Analyst who has been with LRS Retirement Solutions since 1998. Megan began her PensionGold career as a Technical writer with Version 2. She then moved on to become a Product Support team member and Product Support Team Lead for the same version. Transitioning onto the PensionGold Product Research and Development Team, Megan was able to bring support experiences to the development of PensionGold Version 3. She then moved into a Business Analyst role with Version 3. Prior to coming to LRS, Megan worked for Integrated Business Systems as a Support Specialist, a Software Instructor as well as a Technical Writer.

Farhan Kader is a Software Developer on the Product Support group and works with PensionGold Version 3 customers. He holds a B.S. in Computer Engineering from University of Texas at San Antonio. In addition to providing day-to-day development support to PensionGold customers, Farhan has been heavily involved with keeping all the Version 3 customers up to date with the latest features. He has been with LRS since 2017.

John Katalinich aka “Kat” is a Senior Account Representative on the LRS Retirement Solutions team. His vision for our current customers is to see them utilizing their version of PensionGold software to the fullest and gaining maximum benefit from other products and services provided by LRS. He attends industry conferences to maintain business relationships with current customers and pursue new prospective accounts. John has been involved in the sales and marketing of Information Technology solutions for nearly 30 years and has been working in the pension administration industry since his start with LRS in February of 1993.

Presenters

Todd Kennedy is the Team Leader of Product Support for PensionPlus, PensionGold Version 1, PensionGold Version 2 and PensionGold Advantage customers. Todd joined LRS in February 2006. Prior to becoming a Team Leader, Todd served as a Business Analyst in PensionGold Version 2 Product Support. Todd has a B.A. in Accounting from Western Illinois University and has 19 years of public pension fund experience. Prior to joining LRS, Todd worked for the Illinois Teachers' Retirement System (TRS), where he was responsible for employer reporting, accounting, and general administration of the fund.

Justin Long is the Product Development Manager for LRS Retirement Solutions. Justin has 17 years experience working at LRS and has held various positions as a developer, team lead, and manager on both the Implementations and Product Research and Development teams. Justin and his staff are responsible for the continuous maintenance and improvement to the PensionGold product, including its extensions, integrations and development toolkit.

Mark Luebkmann is a Senior Product Support Specialist with LRS Retirement Solutions and has worked over the last 22 years on PensionPlus, Version 1, Version 2 implementations, and Version 2 Product Support. Before joining LRS, Mark was employed as an engineer in Phoenix, AZ and Los Angeles, CA. Now he resides back in his hometown of Springfield.

Dan McCain is the Director of Product Support. In this role, Dan leads the team responsible for supporting customers running every version of PensionGold software. He has 25+ years of Information Technology and management experience. Dan began his career at LRS in 1995 as an Education Consultant, teaching network design and administration courses. Prior to joining the Retirement Solutions division in 2013, Dan held senior management positions within other LRS groups having responsibilities for product development, sales, and customer support.

Jaime Miers is a Senior Developer on the Product Support team. She provides technical support and solutions for several PensionGold Version 2 customers, including Alameda County Employees' Retirement Association, New Hampshire Retirement System, Fairfax County Retirement Systems, and Dallas Police & Fire Pension System. Most of her time is spent upgrading Web Member Services for customers. Jaime has been with LRS for 21 years.

Rhonda Nerison is a Senior Developer on the Product Support team and has provided daily support to PensionGold Version 1 customers for the last 20+ years. In addition to supporting several Version 1 customers, Rhonda has taken on the role of business analyst on the Product Support team working with Version 3 customers, specifically with the City of Austin Employees' Retirement System.

Chris Ose is a Senior IT Systems Analyst for LRS Retirement Solutions. He works within the PensionGold Infrastructure and Technical Services (ITS) team to provide technical support and solutions for customers and other Retirement Solutions teams. Prior to joining LRS in June of 2016, he was employed by GSI Group in Assumption, IL for 10 years, where he was an Infrastructure Lead and SAP Basis Administrator.

Mike Plunkett is a Senior Product Support Specialist for the Product Support team. Mike has worked in LRS Retirement Solutions with PensionGold Version 2 customers since August 2007. Prior to joining the LRS family, he was employed by JP Morgan Chase Bank for 16 years in Information Services. His primary responsibilities were supporting the bank's ACH and Check Recon systems as an application developer.

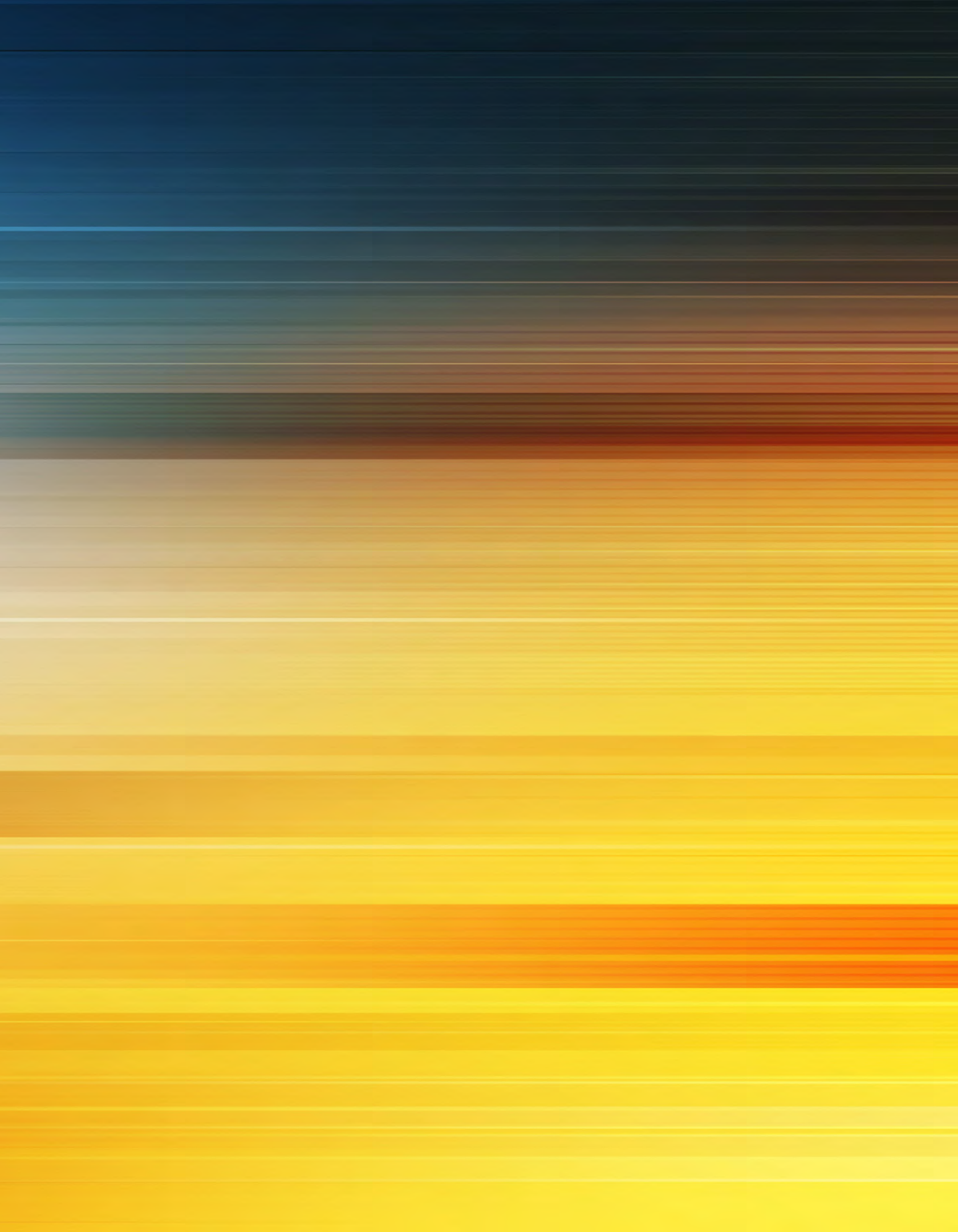
Jeff Proffitt is currently a Team Lead on the Product Support team. Jeff previously served as a Business Analyst and has worked with PensionGold Version 3 customers since he joined LRS in 2006. He holds a B.S. in Business Administration and Economics from Illinois College. Prior to joining LRS Retirement Solutions, Jeff was employed as a Senior Auditor with the Teachers' Retirement System of the State of Illinois for 14 years.

Presenters

Shannon Rennecker is a Senior Product Support Developer who started with LRS Retirement Solutions in 2000 supporting PensionGold Version 2 customers. Since that time she has also been a member of the Product Research and Development team and went on to work with some PensionGold Version 3 customers in Product Support. Shannon currently provides analytical support and technical solutions for all PensionGold Version 2 customers and select Version 3 customers.

Laura Soehnl is the Product Business Architect for the Product Research and Development Team. Since joining LRS Retirement Solutions in 1995, she has worked with every version of the PensionGold suite of products, and in every major group within the division, including Implementations, Product Development, and Product Support. In her current role, she is involved in the identification, planning, design, and development of new product features and ongoing maintenance of all products.

Phil Sporcich is a Team Lead on the Product Support team. He also currently serves as a Senior Developer on multiple projects. Phil holds a B.S. in Computer Science from Illinois College and is a Microsoft Certified Professional. In addition to providing day-to-day support to LRS Retirement Solutions customers, Phil has been heavily involved with keeping the Version 3 customers up to date with the latest features. He has been with LRS since 2014.





LRS RETIREMENT SOLUTIONS

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