PensionGold®

Teaming Conference

LRS®
RETIREMENT SOLUTIONS

2023

LRS®
RETIREMENT SOLUTIONS

Welcome

Welcome!

Thank you for attending the 2023 PensionGold® Teaming Conference. I'm extra excited to be hosting our conference this year as it is our *30-year anniversary as a division of LRS.* Yes, thirty years ago we started this journey with PensionPlus and PensionGold Version 1. We now have PensionGold Version 4, as well as many new tools in our (and your) toolbox, to better help you service your members, no matter what version you are using. We have never rested on our successes, and this year brings us great excitement to share new offerings, new customers, and future plans. With that said, every year we choose a theme for our conference and build some sessions and activities around that theme. This year it seemed fitting to use **"Never Fold with PensionGold: 30 Years of Pension Software".** You will notice some casino tie-ins during the conference, especially during after-hours activities.

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 one. 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/2023pgtc; **passphrase = pgtc2023**) -- or locate the 2023 PensionGold Teaming Conference program booklet in PDF form at https://www.lrsretirementsolutions.com/Teaming-Conference-login (username = teaming; password = pgold74).

Regarding this year's schedule, we're going with what seemed to work well last year. We have again packed several sessions into 2 full days, which allows us to wrap up the formal portion of the conference at 5:00 PM on Wednesday. Thursday morning offers *optional* sessions, primarily product labs offering you an opportunity to get answers to specific product questions or take a closer look at features in our products with assistance from our team. Those who stayed and participated in the optional sessions last year strongly felt the time was well served and valuable. Therefore, we recommend you consider taking advantage of these optional sessions if your travel plans allow.

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 at the Inn at 835 Conservatory for the Teaming Conference Reception on Tuesday evening, which provides networking opportunities with your peers in a casual setting. You can kick back and relax with great food and drinks of course; you're also invited to test your "poker face" in our very own casino for the evening!

Thank you for choosing LRS, our PensionGold products, and for joining us at the 2023 PensionGold Teaming Conference!

Tom

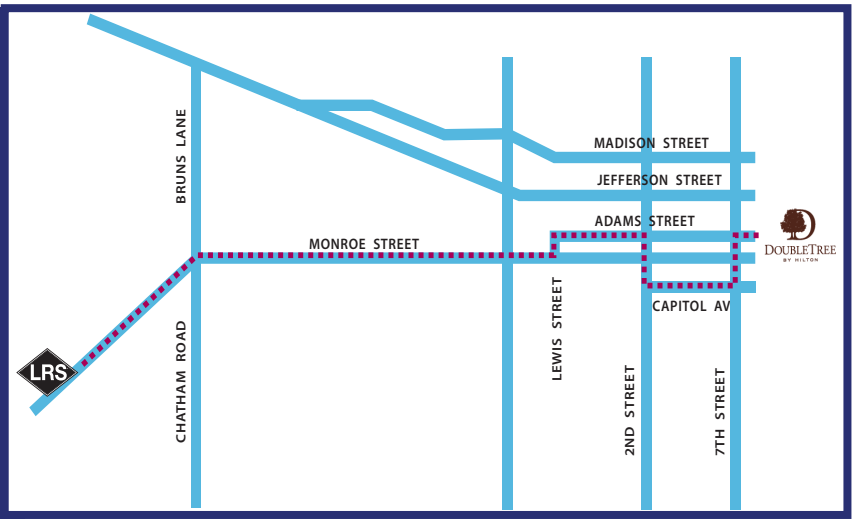
Tom Chesser

Defining tomorrow. Delivering today.

Maps & Shuttle

HOTEL TO LRS CAMPUS

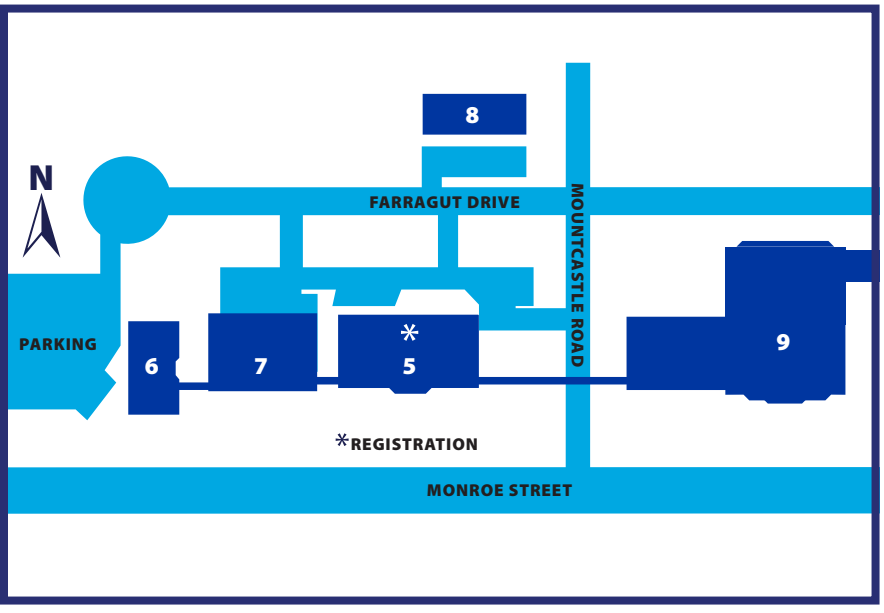
1. Go West on E. Adams toward S. 7th
2. Turn left at S. 7th St.
3. Turn right at E. Capitol Ave.
4. Turn right at S. 2nd St.
5. Turn left at E. Adams St.
6. Turn left at S. Lewis St.
7. Turn right at W. Monroe St.
8. LRS on right at 2401 W. Monroe St.
9. Park near Bldg. 6, and follow the sidewalk to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



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

SHUTTLE SCHEDULE

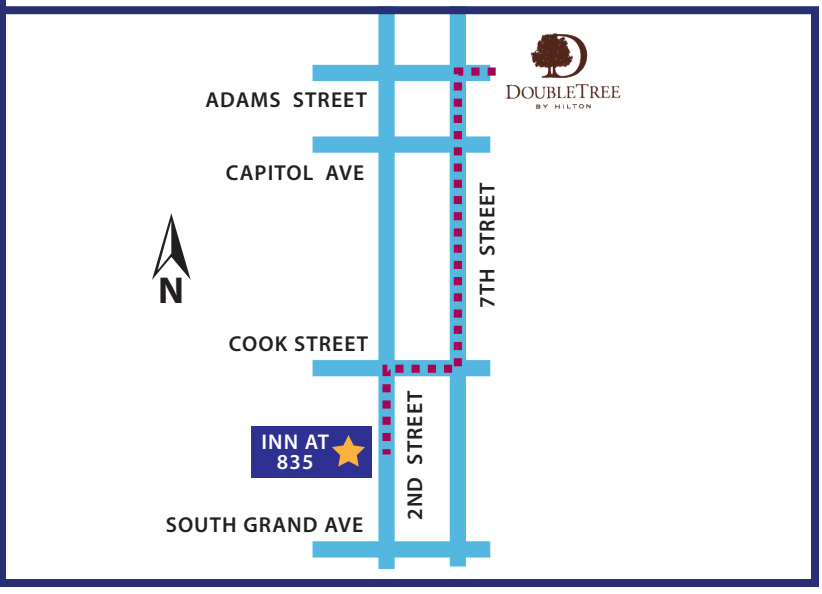
TUESDAY 10/3: DoubleTree - President Abraham Lincoln Hotel Departures 7:15 am and 7:45 am;
Return to the hotel 15 and 45 minutes after last session.

WEDNESDAY 10/4: 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 10/5 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.

TO THE INN AT 835

1. From DoubleTree - President Abraham Lincoln Hotel, proceed WEST on Adams to 7th Street.
2. Turn LEFT on 7th Street and follow 7th Street SOUTH to Cook Street.
3. Turn RIGHT onto East Cook Street.
4. Proceed WEST to South Second Street.
5. Turn LEFT and proceed SOUTH on South Second Street to the Inn at 835, at 835 S. Second Street. Parking is located on the NORTH side of the Inn.



CONTACTS

Tom Chesser
217-836-2937

Dan McCain
217-725-2127

John Katalinich (Shuttle)
217-836-2767

LRS (Julie Milner)
217-793-3800, ext. 1851
cell: 217-691-1541

Trevor Donahue
314-952-3740

Leah Hardy
217-553-5155

Jay Boor (Shuttle)
217-862-9304

Lincoln Yellow Cab
217-523-4545

DoubleTree - President Abraham Lincoln Hotel
217-544-8800

Frequently Asked Questions

How do I connect to the LRS Wi-Fi?

Wi-Fi is available throughout the LRS campus. Join the "LRSGuest" network by using self-registration with your email address or cell phone number. After you enter the registration code, which is 1979, you will receive login credentials.

How do I download the mobile app?

Stay up to the minute with our mobile app, powered by Guidebook. Scan the QR code or navigate to https://guidebook.com/g/2023pgtc and use the passphrase "pgtc2023".

Where is the Internet Café?

If you need a laptop or printer during your time at the PensionGold Teaming Conference, you are welcome to use the Internet Café located just outside the Auditorium in the Building 5 Atrium.

Is there a shuttle between the hotel and LRS?

Yes! 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 LRS and the DoubleTree - President Abraham Lincoln Hotel. There are scheduled pickups and drop-offs in the mornings (see Pg. 3) 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.

Where can I park my vehicle?

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 are located in LRS Building 5 at 2401 W. Monroe Street (a short 3-minute walk from the parking lot).

Which sessions can I attend?

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.

Are meals included?

Yes! You are welcome to start your morning with breakfast at the LRS Campus, in the Building 5 Atrium. Throughout the day you'll find snacks and beverages at locations near the sessions. Lunch will be served on Days 1 and 2 of the conference in the Building 5 Atrium with seating in the Auditorium and the Atrium.

Where can I charge my phone?

Bring your charging cable to the conference and plug into the USB connection available at EVERY seat in our main classroom in LRS Building 9 (where the Welcome Session is held). If you forget your cable or need other charging options, check out the Internet Café in the LRS Building 5 Atrium.

What is the Team Challenge?

During the 2023 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 Wednesday afternoon's Closing Session. Most of the activities related to the Team Challenge are focused on this year's theme: *Never Fold with PensionGold: 30 Years of Pension Software.* 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!

LRS Retirement Solutions
PensionGold Teaming Conference
October 3 – 5, 2023
Agenda

Tuesday, October 3rd

7:30 AM – 8:30 AM

Registration Check-In and Breakfast at LRS

8:30 AM – 9:55 AM

Welcome and Introductions *(Session 1)*

Welcome to the 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, 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 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.

10:10 AM – 11:00 AM

Product Update – Version 3 & 4 *(Session 18)*

Presented by Justin Long, Laura Soehnlin, Eric Johnson, and Jeff DeKoker

Join the Product Development team for an update on recent and planned development activities affecting both Version 3 and Version 4.

Product Update - Version 2 *(Session 16)*

Presented by Dan McCain and Bob Blythe

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. The session will also provide a forum for customers to present ideas, suggestions, or requests for product features and enhancements.

11:10 AM – 12:00 PM

Retirement Solutions 101 *(Session 3)*

Presented by Jeff Proffitt and Bob Blythe

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.

Microsoft Excel Tips & Tricks *(Session 4)*

Presented by Penny Morgan of LRS Education Services

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

The New Google Analytics (GA4) *(Session 5)*

Presented by Andy Krug of LRS Web Solutions

Google Analytics is the enterprise-class web analytics solution that gives you rich insights into your website traffic and marketing effectiveness. Powerful, flexible, and easy-to-use features let you see and analyze your traffic data in an entirely new way. This session will give an overview of what GA4 provides, what value it can provide, and what it takes to get it included in your website (WMS or MemberDirect).

12:00 PM – 1:05 PM

Lunch

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

1-on-1 Meetings *(Session 23)*

Attend pre-scheduled meetings with Management, your Product Support team, your Implementations team, the Product 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.

12:35 PM – 12:55 PM

Campus Tour *(Session 13a)*

Take 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. *(Note: Same as the tour offered at the 2022 conference.)*

1:05 PM – 2:20 PM

"Engage Your Membership" Panel Discussion *(Session 2)*

Customer Panelists: Rebekah Bardakos, Colin Bishop, and Stacy Osborne-Fry. Moderated by John Katalinich.

More and more effort is being made to engage membership participation, whether it is through electronic means or seminars. What are some the new ideas being used to continually encourage membership participation? Three customer panelists will share information from their organizations, and the moderator, John Katalinich, will be encouraging input and discussion from the audience.

2:35 PM – 3:20 PM

PensionGold Does That? – Version 3 *(Session 19)*

Presented by Sam Umbanhowar and Jacob Wind

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 17)*

Presented by Mark Luebkemann and Steven Barnes

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. The session will also provide a forum for customers to present ideas, suggestions, or requests for product features and enhancements.

1-on-1 Meetings *(Session 23)*

Attend pre-scheduled meetings with Management, your Product Support team, your Implementations team, the Product 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.

3:30 PM – 4:45 PM

PensionGold Version 4 Demo *(Session 6a)*

Presented by Laura Soehnlin

Join the Product Development team for a demonstration of PensionGold Version 4.

Customizations & Enhancements – Version 3 *(Session 20)*

Presented by Chris Collins and Alec Welch

Many different customizations have been implemented for Version 3 customers to improve productivity, increase security, and increase the amount of useful information available to the user. This session covers two of these customizations: PensionGold Multi-Factor Authentication (MFA) and MemberDirect Form Management, including new Online Forms. In addition to a demonstration, an overview of each topic will be provided, highlighting the value each one provides.

6:00 PM – 9:00 PM

Teaming Conference Reception – Inn at 835 Conservatory, Springfield, IL *(Shuttle departs hotel: 5:55 and 6:10)*

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 Teaming Conference Reception. You're invited to test your "poker face" at our **casino-themed reception** taking place on Tuesday night at the Inn at 835 Conservatory in Springfield. Join us for food, drinks, and fun!

Casual attire is appropriate. Spouses or significant others are welcome to attend. *(Please be sure to note their plans to attend when you submit your registration).*

LRS Retirement Solutions
PensionGold Teaming Conference
October 3 – 5, 2023
Agenda

Wednesday, October 4th

7:30 AM – 8:30 AM

Breakfast at LRS

8:30 AM – 10:40 AM

Roundtable Discussions *(Session 7)*

Attendees will have an opportunity to join several tables during this two-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: Member Identification other than SSN, Electronic Signatures, "The Tom & Kat Chat", DBA Checkup, Death Audit Processing, V4 Tech Talk, Training New Staff, and Cybersecurity with LRS IT Solutions.

10:50 AM – 11:50 AM

Customer Product Suggestions Roundtable – All Versions *(Session 9)*

Moderated by Laura Soehnlin, Trevor Donahue, and Bob Blythe

This session has been reserved to give conference attendees an opportunity to provide feedback regarding PensionGold products and services. It's a forum for customers to present ideas and suggestions for product features and enhancements that may not already be planned for 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. This session is open to customers running any version of PensionGold.

1-on-1 Meetings *(Session 23)*

Attend pre-scheduled meetings with Management, your Product Support team, your Implementations team, the Product 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.

11:50 AM – 1:00 PM

Lunch

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

1-on-1 Meetings *(Session 23)*

Attend pre-scheduled meetings with Management, your Product Support team, your Implementations team, the Product 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.

12:30 PM – 12:50 PM

Campus Tour *(Session 13b)*

Take 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. *(Note: Same as the tour offered at the 2022 conference.)*

1:00 PM – 2:00 PM

PensionGold Customer Led Session *(Session 8)*

Moderated by Tiffany Weber

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.

2:15 PM – 3:05 PM

Correspondence and Electronic Document Management / Imaging Roundtable *(Session 11)*

Moderated by Missy Herrman, Aaron Bessie, and Phil Sporcich

Customers continue to look for ways to increase their use of the electronic document imaging system and correspondence features within PensionGold. Share, listen, and interact with other funds alongside LRS resources which can help guide the conversation through best practices LRS has implemented in recent years.

Workflow and Workload Management Roundtable *(Session 12)*

Moderated by Tony Quiriconi, Troy Higginbotham, and Shawn Farris

Join Retirement Solutions team members as they facilitate this roundtable session which provides an opportunity for customers to share how they have managed work with various PensionGold functionality. Topics will include Workflows, Message Center, Contact Logs, Correspondences, and Milestones.

3:15 PM – 4:05 PM

PensionGold Security Panel Discussion *(Session 10)*

Presented by Peter Chenoweth, Mike Chestnut, and Phil Sporcich

This highly interactive session will provide a forum for LRS Retirement Solutions to share security best practice solutions for the PensionGold suite of products. Customers are encouraged to join the conversation and seek advice from others in attendance.

4:15 PM – 5:00 PM

Closing Session *(Session 14)*

We will wrap up the formal portion of our PensionGold Teaming Conference with a final session, late on Wednesday afternoon. 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.

(Note: Optional sessions taking place the morning of Thursday, October 5th, are shown on the following page.)

LRS Retirement Solutions
PensionGold Teaming Conference
October 3 – 5, 2023
Agenda

Thursday, October 5th *(optional)*

7:30 AM – 8:30 AM

Continental Breakfast at LRS

8:30 AM – 9:30 AM

PensionGold Product Lab *(Session 15a)*

Staffed by Jaime Miers, Phil Sporcich, and Leah Hardy

Are you curious about enhancements to the PensionGold products? Are you wanting to become more familiar with Template Editor or Ad Hoc Reporting tools? Do you have questions about Outlook Connector or Message Center? Are there other features within the PensionGold suite of products you would like to work with? This is your chance to get hands-on experience. We will have members of our Retirement Solutions team on hand and available to assist you and answer your questions. If there are specific scenarios you would like to observe, chat with your favorite Retirement Solutions staff member prior to the Product Lab so they will be able to tailor the session to your needs.

Ad Hoc Reporting Roundtable – Version 3 & 4 *(Session 21)*

Moderated by Peter Chenoweth and Nolan Groenewold

Join our DBA and Product Support team members for a roundtable discussion about all things ad hoc reporting within PensionGold Version 3 and Version 4. Curious about best practices? Not sure where to begin? Have technical questions about the solutions? This is the session for you. We will present a brief overview and demo of our ad hoc solutions, but most of the time will be spent in open discussion.

1-on-1 Meetings *(Session 23)*

Attend pre-scheduled meetings with Management, your Product Support team, your Implementations team, the Product 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.

8:30 AM – 8:50 AM

Campus Tour *(Session 13c)*

Take 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. *(Note: Same as the tour offered at the 2022 conference.)*

9:45 AM – 10:45 AM

PensionGold Product Lab *(Session 15b)*

Staffed by Shannon Rennecker and Trevor Donahue

See description shown for 8:30 AM session.

PensionGold Version 4 Demo *(Session 6b)*

Join the Product Development team for a demonstration of PensionGold Version 4.

1-on-1 Meetings *(Session 23)*

Attend pre-scheduled meetings with Management, your Product Support team, your Implementations team, the Product 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.

9:45 AM – 10:05 AM

Campus Tour *(Session 13d)*

Take 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. *(Note: Same as the tour offered at the 2022 conference.)*

PensionGold Teaming Conference Schedule
2023

Room	Rm Size	Tuesday, October 3							
		8:30 - 9:55	10:10 - 11:00	11:10 - 12:00	12:00 - 1:05	1:05 - 2:20	2:35 - 3:20	3:30 - 4:45	6:00 - 9:00
Building 9 - Classroom 307	84	#1 Welcome Session (Teams "Meet & Greet" portion starts at 9:30)	#18 V3-4 Product Update			#2 Engage Your Membership (Panel Discussion)	#19 V3 PensionGold Does That?	#6a PensionGold Version 4 Demo	Teaming Conference Reception The Inn at 835 Conservatory
Building 6 - Classroom 2 (LAB)	14			#3 Retirement Solutions 101					
Building 6 - Classroom 7	35			#5 The New Google Analytics (GA4)					
Building 6 - Classroom 8	35			#4 Microsoft Excel Tips & Tricks					
Building 5 entryway - at "Registration Desk"	n/a				(at 12:35) #13a Campus Tour				
Building 5 - Atrium	n/a				Lunch				
Building 5 - Auditorium	48		#16 V2 Product Update				#17 V2 PensionGold Does That?	#20 V3 Customizations & Enhancements	
Location To Be Determined	n/a				#23 1-On-1 Meetings		#23 1-On-1 Meetings		

KEY:

Meals
Version 2 & Adv
Version 3-4
General Sessions

9/21/2023

PensionGold Teaming Conference Schedule
2023

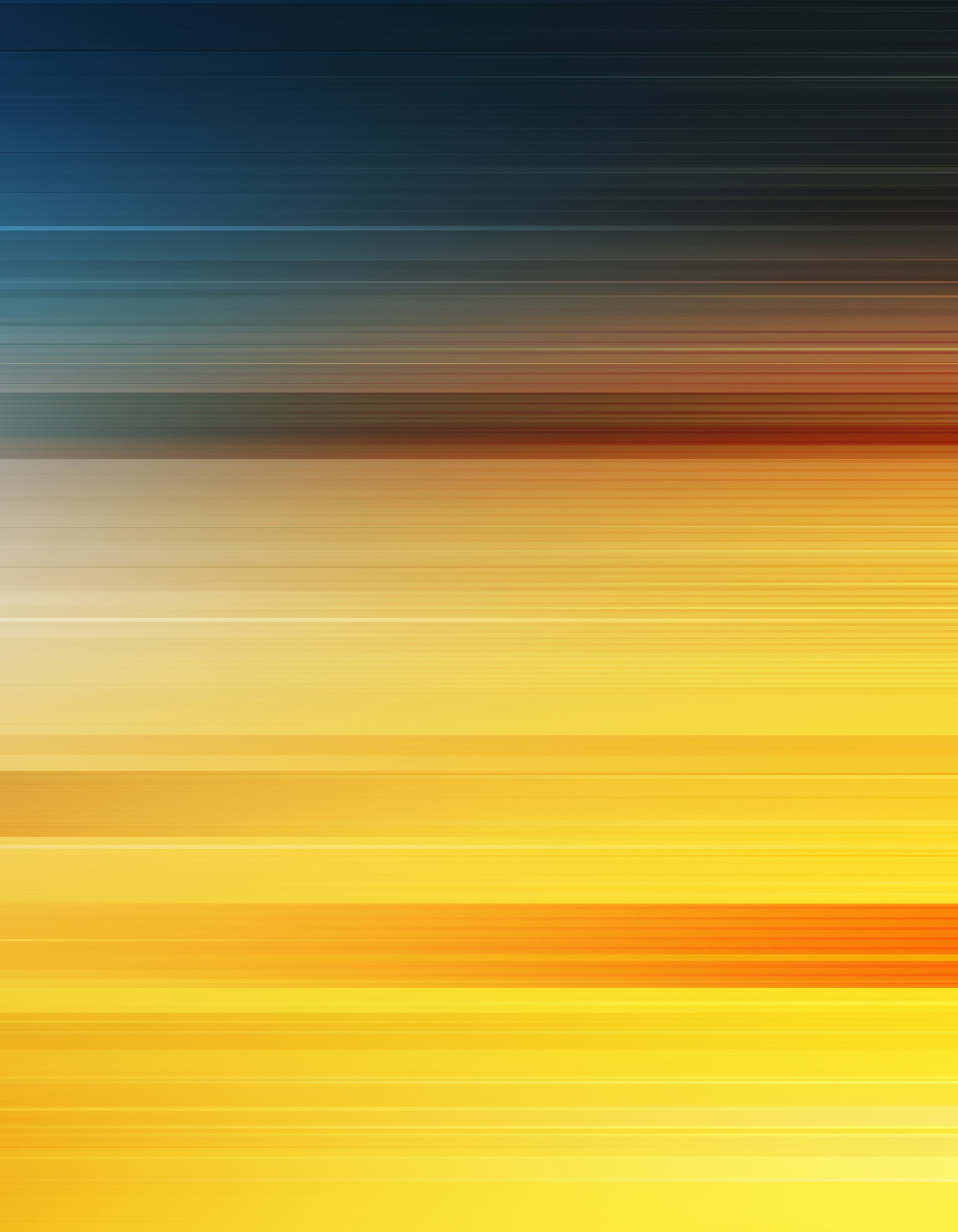
Room	Rm Size	Wednesday, October 4								Thursday, October 5	
		8:30 - 10:40		10:50 - 11:50	11:50 - 1:00	1:00 - 2:00	2:15 - 3:05	3:15 - 4:05	4:15 - 5:00	8:30 - 9:30	9:45 - 10:45
Building 9 - Classroom 307	84			#9 Product Suggestions Roundtable		#8 Customer Led Session	#12 Workflow and Workload Management Roundtable	#10 PensionGold Security Panel Discussion	#14 Closing Session		#6b PensionGold Version 4 Demo
Building 6 - Classroom 2 (LAB)	14									#15a Product Lab	#15b Product Lab
Building 6 - Classroom 7	35									#21 Ad Hoc Reporting Roundtable	
Building 6 - Classroom 8	35										
Building 5 entryway - at "Registration Desk"	n/a				(at 12:30) #13b Campus Tour					#13c Campus Tour (8:30 to 8:50)	#13d Campus Tour (9:45 to 10:05)
Building 5 - Atrium	n/a				Lunch						
Building 5 - Auditorium	48	#7 Roundtable Discussions					#11 Correspondence & EDM/Imaging Roundtable				
Location To Be Determined	n/a			#23 1-On-1 Meetings	#23 1-On-1 Meetings					#23 1-On-1 Meetings	#23 1-On-1 Meetings

No Evening Event Planned

KEY:

Meals
Version 2 & Adv
Version 3-4
General Sessions

9/21/2023



LRS RETIREMENT SOLUTIONS
2401 WEST MONROE STREET • SPRINGFIELD, IL 62704
217.793.3800 • LRSRetirementSolutions.com