



PensionGold® Teaming Conference 2025

DRAFT AGENDA as of June 20, 2025

General Sessions

□ **Welcome and Introductions**

Welcome to the Annual PensionGold Teaming Conference! 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.

□ **Customer Panel Discussion: Groove and Improve Your Business Practices**

Every public pension fund has business processes that must be completed periodically: the annual financial statement, actuarial valuation, audit, 1099R, COLA, interest posting, etc. Don't let these processes give you the blues. For this year's panel discussion we will get into the groove of how customers manage these processes efficiently, so they don't have to dance around problems. Our customer panelists will share information from their organizations, and moderator John Katalinich, will be encouraging input and discussion from the audience.

□ **Customer-Led Session: Open Discussion Forum**

This session offers a unique opportunity for attendees to engage in an open, customer-driven discussion. Topics may range from industry trends and legal developments to technology tools and everyday challenges in pension administration. Typically led by one or two customer representatives selected prior to the conference, this popular session encourages knowledge-sharing, networking, and candid conversation among peers.

□ **Retirement Solutions 101: An Introduction to Product Support**

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. You'll gain valuable insights into the support structure, available resources, and how we partner with you throughout your PensionGold journey.

□ **MemberDirect: Gathering Insights from Real-World Use**

We want to hear from you how MemberDirect is used in the real world and where there may be untapped potential. From Benefit Estimates and Direct Deposit Changes to Message Center and Online Forms, your insights will help guide future improvements.

- **MemberDirect Version 4: First Look**
See what's new and improved in the recently released MemberDirect Version 4.
- **PensionGold Version 4: Features & Benefits Demo**
Join us for a demo of PensionGold Version 4, showcasing its key features and improved user experience.
- **PensionGold Security Panel: Best Practices and Open Discussion**
Join this interactive discussion as LRS Retirement Solutions experts share security best practices for the PensionGold suite of products. Designed as an open forum, this session invites customers to ask questions, share experiences, and exchange insights with both the panelists and fellow attendees. It's a valuable opportunity to explore practical approaches to system security in a collaborative setting.
- **Discussion Tables: Collaborate with Peers**
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. Sample topics include:
 - Training New Staff
 - Contact & Activity Tracking with Members
 - Kat & Shawn's Table
 - Death Auditing Practices
 - Online Retirement and Member Self-Service
 - Verifying Members by Phone
 - Employer Reporting: Common Challenges and Solutions
 - Reducing Paper with Online Forms and Document Management
- **Roundtable Discussion: Correspondences and Electronic Document Management**
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. Be sure to submit your questions early to make the most of this engaging discussion.
- **Artificial Intelligence (AI)**
TBD
- **Member Portals: Customer Enhancements**
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.

□ **PensionGold: Customer Enhancements**

The Product Support team will present a variety of customer-requested enhancements that may benefit other pension funds. A few highlights include integrations with third-party tools for phone call tracking and recording, targeted email blasts, MemberDirect account search functionality, and SMS text messaging for member verification by fund staff.

□ **PensionGold Base Releases: Insights for Customers**

The Product Support team will highlight recent updates to the core PensionGold suite of products. Attendees will gain insight into how Base Action Items (BAIs) are reviewed, prioritized, and selected for implementation across individual customer environments.

□ **PensionGold Version 2: Ask the Experts**

Bring your questions, ideas, and feedback to this interactive session focused on PensionGold Version 2. Whether you're curious about existing features, wondering if PGv2 can support specific pension processes, or have suggestions for future enhancements, this is your opportunity to engage directly with LRS Product Support experts and peers from other pension funds. Share your experiences, explore possibilities, and collaborate to get the most out of PGv2.

□ **PensionGold Reporting: The state of Ad Hoc**

Semantic models, WynReports, DataDirect, and PowerBI. Confused about ad hoc reporting options? Not sure where to get started? Curious about where PensionGold ad hoc reporting is headed? This is the session for you. In this session, we will demonstrate and discuss the different ad hoc reporting tools in use by PensionGold customers and take a sneak peek at future possibilities for ad hoc reporting.

□ **Google Analytics (GA4)**

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 is, what value it can provide, and what it takes to get it included in your website (WMS or MemberDirect).

□ **1-on-1 Meetings: Personalized Time with the Retirement Solutions Team**

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 build relationships, discuss current challenges, plan for upcoming projects, or explore new features and releases in detail. Time slots for 1-on-1 meetings are available on the first day of the conference and during the optional final day. Many attendees find these personalized conversations to be among the most beneficial parts of the event.

- **Teaming Conference Reception: An Evening at the “LRS Park”**
(Tuesday evening) Join your fellow attendees and the LRS Retirement Solutions team for a relaxed and entertaining evening at the LRS Corporate Headquarters. This is a great opportunity to connect with industry peers and LRS team members while enjoying food, drinks, and fun in a casual outdoor setting.
- **Closing Session: Wrap-Up and Reflections**
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 our 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—prizes will be awarded to those in attendance. Don't miss this chance to celebrate, share insights, and help us make next year's conference even better!

Mini-Sessions (30 minutes)

- **Mini-Session 1: The Lifecycle of a PIR**
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.
- **Mini-Session 2: DR and PGSecure: Do I need both?**
Our team supports both Disaster Recovery (DR) services and PGSecure, which provides full operational support by running pension processes on your behalf during a disaster. This session will break down the differences between the two, explain how they work together, and help you decide what makes the most sense for your fund's continuity planning.
- **Mini-Session 3: Security Features of MemberDirect**
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 ensure that member changes remain secure and protected.
- **Mini-Session 4: PageCenterX (PCX) Enhancements**
Explore the latest features in PageCenterX, including a cleaner login experience with OAuth enabled, drag-and-drop file uploads, display of relevant index values based on your configuration, and more. See how these enhancements make your imaging workflow smoother and more efficient.
- **Mini-Session 5:**
TBD
- **Mini-Session 6: Tax Reporting: Future-Proofing with IRIS Integration**
Learn about the IRS's new IRIS system and how we plan to integrate with it to future-proof our tax reporting process.

Optional Sessions (Thursday Morning 30 minutes)

- Vulnerability/Intrusion Scanning
- Benefits of a Hosted Environment
- EmployerDirect Refresh (v4)
- Online Retirement Processing
- AgilePoint Workflow
- One-on-one - PowerBI SSRS, Wyn, or DataDirect Reporting
- Template Editor

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