PENSIONGOLD® TEAMING CONFERENCE

"Construction Zone Ahead…
Building for the Future"

September 18-20, 2018

Levi, Ray & Shoup, Inc.
Corporate Headquarters

2401 W. Monroe Street
Springfield, Illinois

—Draft—
Agenda
As of August 20, 2018

Tuesday, September 18th

7:30 AM – 8:30 AM

Registration Check-In and Breakfast at LRS

8:30 AM – 9:30 AM

Welcome and Introductions

Welcome to the 22nd Annual PensionGold® Teaming Conference! We will include a roll-call introduction of customers 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 "Bike Build for Charity" event, an overview of this year's conference theme, and details of this year's Team Challenge.

Throughout the Day

1-on-1 Meetings

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.

9:45 AM – 10:45 AM

Product Update – Version 3

In this session, the Product Research and Development team will review recent development activities with PensionGold Version 3. This will include an overview of the significant product features and enhancements released since last year's conference, as well as a sneak peek of our redesigned EmployerDirect extension and other exciting new functionality.

Product Update - Version 2

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

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.

11:00 AM – 12:00 PM

Product Support Zone – Version 3

Attendees will be encouraged to ask questions to spur discussion and have direct interaction with other attendees as well as the Version 3 Product Support staff. This session is a "free-for-all" including discussion about primary business processes, best practices, using business audit functionality, etc.

Balancing Act I – Payroll Processing – Version 2

This session will provide attendees a general overview of Payroll Processing within PensionGold Version 2. This session will also provide a forum for customers to explain their payroll balancing procedures and to offer suggestions for improving this process. LRS will explain one customization that was done for a customer that greatly reduced the number of Trials required to prepare payroll for posting.

PensionGold Customer Breakout Meeting – Version 1

This session has been reserved to provide Teaming Conference attendees an opportunity to take part in a customer-only discussion group allowing attendees the ability to provide feedback to the Product Support team regarding the PensionGold Version 1 product and services.

12:00 PM – 1:00 PM

Lunch

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

1:00 PM – 2:00 PM

Pension Funds Supporting Their Members: Building Blocks and Best Practices (Panel Discussion)

Quality customer service is the foundation for success at every organization. Providing your service representatives with the right tools necessary to provide the best quality service is vital. This session, featuring a panel discussion and moderator, will focus on how pension funds are building and maintaining quality customer service.

2:15 PM – 3:15 PM

Fundamentals of Project Management

Have you ever experienced a project that didn't go as planned? It may have been due to a lack of understanding of the scope of work, insufficient timeline or budget, or some other reason. Project planning and management can help you reduce the risks. This session will provide you some fundamental information on how you can manage a project, whether it's organizing an event, constructing a building, or implementing software.

Using Newer PensionGold Functionality – Version 3

Build your knowledge base with this interactive session with our Version 3 Product Support team. Customers and Product Support staff will join in discussing their use of newer PensionGold Version 3 functionality such as Activity Management & Milestones, Outlook Integration, as well as MemberDirect functionality such as Broadcast Messages, FAQ, Message Center, PIN Functionality, Usage & Enrollment Report.

Balancing Act II – Insurance Processing – Version 2

This session will provide attendees a general overview of Insurance processing while highlighting a few customer customizations implemented to streamline this process within PensionGold Version 2. This session will also provide an opportunity for customers to present thoughts and descriptions on how they maintain their insurance plans and rates along with a forum to offer suggestions for improving this process.

PensionGold Version 1 Product Lab

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

Retirement Solutions 101

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 PensionGold Product Support teams, plan to attend this informative session.

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

Microsoft has chosen to depreciate the Semantic Model Definition Language (SMDL) report data models leveraged by PensionGold's current SSRS-based Ad Hoc Reporting solution. Although customers are not immediately affected, we've been proactively researching and developing a new Ad Hoc Reporting solution for PensionGold Version 3 built on ActiveReports Server (ARS) technology. This session will explain our change in direction and include a demonstration of the new Ad Hoc Reporting toolset.

3:30 PM – 4:30 PM

Balancing Act III – Tax Processing – Version 2

This session will provide attendees an overview of PensionGold Version 2 processes related to Internal Revenue Service requirements. Annual 1099 and 945 processing as well as 415 limit testing will be reviewed. Suggested best practices will be provided along with ample time for attendees to discuss their specific workflow.

PensionGold Version 1 Product Lab *(continued)*

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

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

Teaming Conference Dinner – Loukinens' on 4th, Springfield

Join your fellow attendees and the LRS Retirement Solutions team for cocktails and a sit-down dinner at Loukinens' on 4th, an upscale restaurant serving American cuisine along with a view to the newly-renovated Governor's Mansion.

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).*

Wednesday, September 19th

7:30 AM – 8:30 AM

Breakfast at LRS

8:30 AM – 10:30 AM

Roundtable Discussions

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 Artificial Intelligence (AI), BCP/Disaster Recovery, Server (database) Upgrade Strategies, Vulnerability Scanning, Imaging/Barcoding/Scanning, SOC II and PII, and Social Media.

Throughout the Day

1-on-1 Meetings

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

10:45 AM – 11:45 AM

Constructing Test Plans

In this session, members from various Retirement Solutions teams will share Best Practices for structured software testing and provide attendees a software testing lifecycle model. Attendees will be introduced to several levels of testing and shown tips during this session.

Template Editor – Version 3

Template Editor functionality improved as part of the ESF 1.12 release. Updates include support for Office 2016 connection profiles, streamlined template creation, template promotions, and enhanced security. This session is a refresher for those customers running on ESF 1.12 and will educate the participants about template editor functionality and use of PensionGold Correspondence.

Ad Hoc Reporting (Roundtable) – Version 2

In this session, members of the Version 2 Product Support team will review multiple methods to query PensionGold data. Customers are encouraged to discuss and share their preferred methods for searching, retrieving, and reporting on this data. Topics are anticipated to include the PensionGold IQ Query and Reporting tool, Excel, SQL queries, Crystal Reports, and Access databases.

11:45 AM – 12:45 PM

Lunch

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

12:45 PM – 2:00 PM

Customer Product Suggestions – Version 3

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.

12:45 PM – 2:00 PM

PensionGold Version 3 Product Lab

Are you curious about the latest enhancements to the PensionGold Version 3 product you learned about during earlier sessions? 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 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. Due to increased interest and demand, we have scheduled the Product Lab for two days again this year. 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.

Customer Product Suggestions – Version 2

This session has been reserved to provide Teaming Conference attendees an opportunity to provide feedback regarding 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

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.

2:00 PM – 4:00 PM

Break Time

Depart the LRS campus and return to your hotel for a break before the rest of the day's events at Erin's Pavilion, Southwind Park, Springfield.

4:00 PM – 6:00 PM (Shuttle departs hotel: 3:35)

"Bike Build for Charity" Event

Instead of having a guest speaker at this year's conference, we're adding a special event for conference attendees. This charity program incorporates engaging audio/video clues and fun challenges and activities, enabling teams to earn the parts necessary to assemble bikes for children in need. This event will take place on Wednesday prior to the Teaming Conference Reception at Erin's Pavilion in Springfield.

6:00 PM – 9:00 PM

Teaming Conference Reception – Erin's Pavilion, Southwind Park, Springfield

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.

Casual attire is appropriate. Spouses or significant others are welcome to attend at no additional cost. *(Please be sure to note their plans to attend when you submit your registration).*

LRS Retirement Solutions
Teaming Conference
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Agenda

Thursday, September 20th

7:30 AM – 8:30 AM

Breakfast at LRS

8:30 AM – 9:30 AM

PensionGold Customer Led Session

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.

8:30 AM – 10:45 AM

1-on-1 Meetings

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

9:45 AM – 10:45 AM

Foundations for Security

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.

PensionGold Version 3 Product Lab

Please refer to session description shown earlier (Wednesday at 12:45 PM.)

PensionGold Version 2 Product Lab

In this session, customers who are curious about the latest enhancements in PensionGold Version 2 or Web Member Services 2.1 will have the opportunity to try them out first hand. While you explore on individual PCs, phones, and tablets, our Product Support team will be available to help you understand how to get the most out of these products and new features and to share examples of best practices. Feel free to come and go any time during the session.

11:00 AM – 11:45 AM

Closing Session

We will wrap up our 22nd 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 Lunch Available

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