PENSIONGOLD® TEAMING CONFERENCE



2018



Welcome

Welcome!

Thank you for attending the 2018 PensionGold® Teaming Conference. We're so glad you could join us this year as we work together to "construct" a bright future for your fund and for LRS Retirement Solutions! Once you arrive on the LRS campus, you'll see some new buildings going up; accordingly, *Construction Zone Ahead...Building for the Future!* has been selected as this year's conference theme.

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 get "in gear" with this year's conference, check out the agenda on our mobile app (https://guidebook.com/g/2018pgtc); passphrase= pgold22 -- or locate the 2018 PensionGold Teaming Conference program book in PDF form at https://www.lrsretirementsolutions.com/Teaming-Conference-login (username = teaming; password = pgold22).

One of the highlights of this year's conference is our "Bike Build for Charity", which replaces our guest speaker event this time around. We are looking forward to seeing you and your team compete in fun iPad challenges to earn points to "buy" bike parts -- and then work together to assemble the bikes for local children in need. One winning team will have bragging rights for completing the bike build first!

Regarding this year's schedule, we decided to use a shortened schedule just as we did in 2017. We've packed several sessions into $2\frac{1}{2}$ 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 Loukinens' on 4th, a casual upscale restaurant with a view of the newly-renovated Governor's mansion. On Wednesday night, you can kick back and relax at our "Construction Zone" reception at Erin's Pavilion in Southwind Park! Of course, there will be no "hard hats" needed -- as we enjoy plenty of food and drinks, a variety of "super-sized" games, and great company. We're looking forward to an all-around good time!

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 continue to "build for the future". Every member of our team is here to help build your "tool set" as 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 PensionGold products and for joining us at the 22nd PensionGold Teaming Conference!

/owv Tom Chesser



Featured Event

Bike Build for Charity



To be held at Erin's Pavilion before the reception on Wednesday, 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.

Competing teams receive iPads and instructions. As teams continually gain points through the iPad challenges, they will be rewarded with trips to the "bike store" to obtain the parts needed for the bike build. Once bikes are built, they are inspected before being displayed with all participants for a group picture. One winning team receives recognition and bragging rights for completing the bike build first!

At the end of the program, the assembled bicycles will be donated to the Boys & Girls Clubs of Central Illinois along with a helmet and a lock for each bike. A representative from the organization, along with enthusiastic recipients of the bikes, will be on hand to take the bicycles out on a test run at the end of the program. This is sure to be a fun and rewarding event for all participants.

In addition to providing enjoyment for those less fortunate, participants in this year's PensionGold Teaming Conference Bike Build for Charity event will work to sharpen their team building skills in the following areas:

- Collaboration to accomplish common goals
- Friendly competition
- Fun and engaging interaction
- Relationship building and networking



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.



Yevette Cooper is a Benefits Specialist for the Police Retirement System of St. Louis (PRS). The PRS serves city police officers, retired officers, and their dependents. Yevette joined PRS in 2013 and is the liaison for LRS. She continues to find

ways to improve/streamline processes for the system. Electronic elections, correspondence, and ad hoc communications via PensionGold are now in place for the Police Retirement System of St. Louis.



Cecile Merrill is a Project Manager for the New Hampshire Retirement System (NHRS) and has more than 16 years of pension administration experience. Her primary role at NHRS is organizing and expediting all PensionGold activities, including legislative

changes, staff modification, and maintenance issues. Cecile holds a B.S. in Management Advisory Service (dual major in accounting and computer science) and an MBA from Southern New Hampshire University in Manchester, New Hampshire. NHRS provides retirement, disability, and death benefits to its eligible members and their beneficiaries. The State of New Hampshire and nearly 470 local government employers participate in NHRS for their employees, teachers, firefighters, and police officers. NHRS has

approximately 48,000 active members and 35,000 pension recipients. NHRS administers a defined benefit plan qualified as a tax-exempt entity under sections 401(a) and 501(a) of the Internal Revenue Code.



Jamie Mullen is a Senior Benefit Specialist at the MoDOT & Patrol Employees' Retirement System (MPERS). MPERS administers retirement and disability benefits for approximately 19,000 active employees, vested former

employees, and beneficiaries of the Missouri
Department of Transportation and the Missouri
Highway Patrol. Jamie has 13 years of public pension
plan experience and is a Certified Employee Benefit
Specialist, a Certified Retirement Counselor®, and a
graduate of the University of Missouri. Jamie's primary
role with MPERS is to provide retirement counseling to
its membership in both individual and group settings,
and he works closely with LRS in order to enhance
MPERS' member outreach efforts.



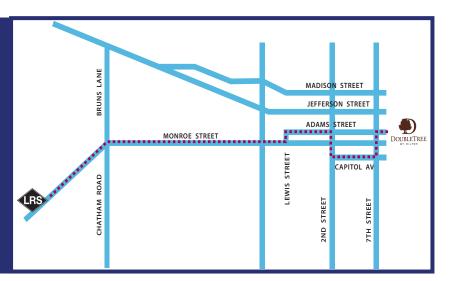
Scott Steventon currently serves as the Acting Director of Retirement for the City of Phoenix Employees' Retirement System (COPERS). Prior to that, he served as the Deputy Director and Operations Manager. Scott is responsible for the effective and

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.

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

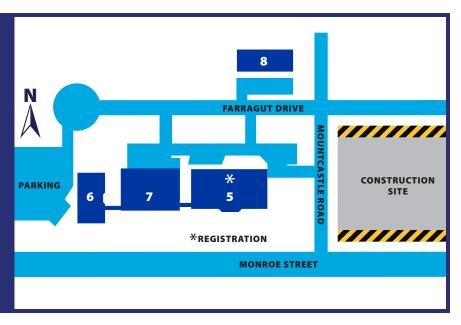
WEDNESDAY 9/19: DoubleTree - President Abraham Lincoln Hotel Departures 7:15 am and 7:45 am; Return to the hotel 15 and 45 minutes after last session.

THURSDAY 9/20: 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

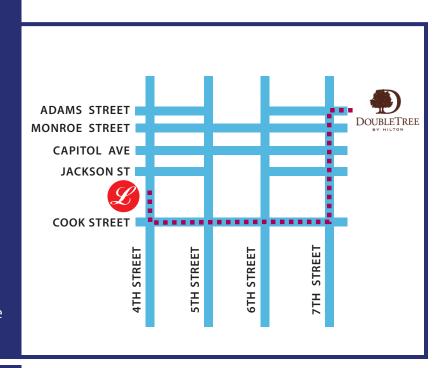
If you drive to the LRS campus versus taking our shuttle from the hotel, please park at 2451 W. Monroe Street (watch for our PensionGold Teaming Conference parking signs). This is the surface parking lot just outside of LRS Building 6. Note that conference registration and check-in is located in LRS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



Maps & Shuttle

TO LOUKINENS' ON 4th

- 1. From DoubleTree President
 Abraham Lincoln Hotel, proceed
 WEST on Adams to 7th Street.
- 2. Follow 7th Street SOUTH, to Cook Street.
- 3. Turn RIGHT and proceed WEST to 4th Street.
- 4. Turn RIGHT onto 4th Street and proceed to Loukinens' on your LEFT.
- 5. Park in Loukinens' lot or Central Baptist Church lot. If these small lots are full, park on 4th Street or Jackson Street (no need to feed the meters after 5 pm).



TO ERIN'S PAVILION AT SOUTHWIND PARK

- From either LRS or DoubleTree President Abraham Lincoln Hotel,
 proceed SOUTH on 5th Street.
- 2. Follow 5th Street SOUTH, approx 9 miles to Exit 90 Toronto Road
- 3. Turn RIGHT at end of exit ramp
- 4. Follow Toronto Road WEST to S. 2nd Street.
- 5. Turn RIGHT onto S. 2nd Street
- 6. Follow to entrance of Southwind Park / Erin's Pavilion



CONTACTS

Tom Chesser 217-836-2937 John Katalinich 217-836-2767 **Todd Kennedy** 217-725-1142 **LRS (Julie Milner)** 217-793-3800, ext. 1851 Dan McCain 217-725-2127 Jeff Proffitt 217-381-2860 Steve Mortimer (Shuttle) 217-793-3800, ext. 1558 Lincoln Yellow Cab 217-523-4545 DoubleTree - President Abraham Lincoln Hotel 217-544-8800

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

One easy way to keep informed of what's going on back at the office during your time at the PensionGold Teaming Conference is the Internet Café located just outside the Auditorium in the Building 5 Atrium. The Internet Café offers access to the internet for checking email. Wi-Fi is also available in LRS buildings; ask for instructions on setting up your device to access the LRS Wi-Fi network.

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, product specific sessions, Workshops, and 1-on-1 meeting times for all attendees. You may attend any session you choose. Please keep in mind, seating capacity is limited in some sessions.

Team Challenge

During the 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 — *Construction Zone Ahead ... Building for the 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!

TUESDAY • SEPTEMBER 18

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.

11:00 AM - 12:00 PM

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 team, plan to attend this informative session.

3:30 PM - 4:30 PM

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.

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.

WEDNESDAY • SEPTEMBER 19

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), Disaster Recovery and BCP, DBA Chat, Vulnerability Scanning, Document Workflow, 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.

10:45 AM - 11:45 AM

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.

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 firsthand 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. Casual attire is appropriate.

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.

THURSDAY • SEPTEMBER 20

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.)

Schedule

TUESDAY, SEPTEMBER 18

Room	Room Size	8:30 - 9:30	9:45-10:45	11:00-12:00	12:00-1:00	1:00-2:00	2:15-3:15	3:30-4:30	6:00 - 9:00
Building 6 Classroom 1	14						#5 Project Management	#3 Retirement Solutions 101	
Building 6 Classroom 2	14+		#13 Product Update	#14 Balancing Act I - Payroll			#16 Balancing Act II - Insurance		
Building 6 Classroom 5	9		•	#10 Pension- Gold Customer Breakout Meeting			#11 Product Lab		ing Conference Dinr Loukinens' on 4th
Building 5 Small Conf. Room	6		#27 1-On-1 Meetings	#27 1-On-1 Meetings		#27 1-On-1 Meetings	#27 1-On-1 Meetings	#27 1-On-1 Meetings	Teaming Conference Dinner Loukinens' on 4th
Building 5 Atrium					LUNCH				Tē
Building 5 Auditorium	46	#1 Welcome Session	#20 Product Update	#21 Product Support Zone		#2 Pension Funds Supp. Mem - Best Practices (Panel)	#22 Using Newer PensionGold Functionality	#23 ActiveReports Server	

KEY

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

WEDNESDAY, SEPTEMBER 19

Room	Room Size	8:30 - 10:30		10:45 - 11:45	11:45-12:45	12:45- 2:00	2:00 - 4:00	4:00 - 6:00	6:00 - 9:00
Building 6 Classroom 1	14			#24 Template Editor		#25a Product Lab			
Building 6 Classroom 2	14+			#15 Ad Hoc Reporting (Roundtable)		#18 Product Suggestions	vents)	ent	tion ilion
Building 6 Classroom 5	9			#6 Constructing Test Plans		#12 Product Suggestions	o evening e	Charity" Ev	ence Reception - Erin's Pavilion
Building 5 Small Conf. Room	6	1-0n-1 1-	#27 -On-1 eetings	#27 1-On-1 Meetings		#27 1-On-1 Meetings	Break time (prior to evening events)	"Bike Build for Charity" Event	Teaming Conference Reception Southwind Park - Erin's Pavilion
Building 5 Atrium					LUNCH		Break t	"Bik	Tean Sout
Building 5 Auditorium	46	#4 Roundtable Discussions				#26 Product Suggestions			

THURSDAY, SEPTEMBER 20

Room	Room Size	8:30 - 9:30	9:45-10:45	11:00-11:45	12:45-12:30	1:15-2:15	2:30-3:30	3:30-4:30	6:00 - 9:00
Building 6 Classroom 1	14		#25b Product Lab						
Building 6 Classroom 2	14+		#19 Product Lab						
Building 6 Classroom 5	9								
Building 5 Small Conf. Room	6	#27 1-On-1 Meetings	#27 1-On-1 Meetings						
Building 5 Atrium					Box Lunches Available (ordered in advance)				
Building 5 Auditorium	46	#7 Customer Led Session	#8 Foundations for Security	#28 Closing Session					

9:45 AM - 10:45 AM

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.

Steven Barnes is a Senior Product Support
Developer on the PensionGold Version 2 Support
team. He provides technical support and solutions
for several customers, including but not limited to
New Hampshire Retirement System, Alameda County
Retirement, San Jose Retirement Systems, 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 dayto-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.

Sarah Carron is a Business Analyst on the LRS Retirement Solutions Version 3 Product Support Team. She holds a B.A. in Visual Communications Design from Purdue University. Prior to joining the LRS family, Sarah worked for Illinois Institute for Continuing Legal Education as a Marketing Associate and HPR Marketing and Consulting as a Senior Graphic Designer and Account Manager.

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 the Director of the LRS Retirement Solutions division and a certified Project Management Professional. He 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 Implementation, 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.

Kathy Convery is the Senior Manager of Implementations for LRS Retirement Solutions. Kathy has over 22 years of experience with LRS and is a certified Project Management Professional. She is responsible for overseeing all of our PensionGold Version 3 implementation projects by working closely with the project teams to ensure each project is successful. Prior to joining LRS, she worked for the State of Illinois and an information technology consulting company in various roles including technical support, analyst, developer, and project manager.

Jeff DeKoker is a Senior Software Developer in the LRS Retirement Solutions Product Research and Development group. As a member of the Product Research and Development team, Jeff's responsibilities include general maintenance of existing software as well as the development of new features and functionality for PensionGold. Jeff became a part of the Retirement Solutions team in 2012 after graduating from Illinois State University with a M.S. in Web Development.

Brett Dial is a Retirement System Specialist for LRS Retirement Solutions Version 3 Implementation team. Brett has been with LRS Retirement Solutions since 2014. Prior to joining the LRS family, Brett worked for the Teachers' Retirement System of the State of Illinois where he worked as a Benefits Counselor.

Trevor Donahue is an Associate Software
Developer for LRS Retirement Solutions Version 3
Support team. 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 the LRS
family, Trevor worked for Crop Risk Services in Decatur,
Illinois where he worked as a Software Developer for
three years.

Shawn Farris is an Implementations Team Lead for LRS Retirement Solutions. Prior to joining LRS full time in 2008, Shawn served as an intern on our Product Research and Development Team and has since served in varying capacities ranging from PensionGold Application Developer to PensionGold Implementation Specialist. Shawn currently manages the Business Analysts for the LRS Retirement Solutions Implementation team, provides quality assurance to multiple ongoing implementation projects, and is instrumental in reviewing proposals to ensure LRS Retirement Solutions continues to meet the needs of both current and future customers.

Sheila Goldsberry is a Business Analyst who has been in LRS Retirement Solutions since 2006. Although she began in Version 2 Product Support, she is now on the Version 3 Product Support team and is also assisting on a current Version 3 implementation project. 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 PensionGold Version 3 Support Team. 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 in PensionGold Product Support 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.

Missy Herrman is an Associate Project Manager for LRS Retirement Solutions. Missy has over 20 years of information technology experience and is a certified Project Management Professional. She is responsible for providing project management services to PensionGold implementation projects. She works closely with the project team and customer to ensure the project is a success. Prior to joining LRS, she was employed as a Systems Analyst for NTT Data, as a Business Intelligence Analyst for Illinois State University, and as a Senior Business Analyst for COUNTRY Financial.

Troy Higginbotham is a Software Developer who has been with LRS Retirement Solutions since 2006 where he started with the Version 3 Implementations Team. In 2010, he made the move to Version 3 Product Support where he currently works. 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.

Eric Johnson is a Software Architect in the Product Research and Development group. Eric's responsibilities include architecting solutions for the PensionGold Version 3 product line and providing technical direction to other developers in the group. Eric has been with LRS Retirement Solutions since 2000, with a brief hiatus where he developed software in the ecommerce industry.

Farhan Kader is an Associate Software Developer for LRS Retirement Solutions. 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 of 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.

Todd Kennedy is the Team Leader of Product Support for PensionPlus, PensionGold Version 1, PensionGold Version 2 and PensionGold Advantage. 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 over 16 years' experience with 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 improvement and advancement of the PensionGold product.

Mark Luebkemann is a Senior Product Support Specialist within LRS Retirement Solutions, and has worked over the last 21 years on PensionPlus, V1.0, V2.0 implementation, and V2.0 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 Senior Manager 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 PensionGold Version 2 Product Support team. She provides technical support and solutions for several customers, including Alameda County Employees' Retirement Association, New Hampshire Retirement System, Fairfax County Retirement Systems, and Dallas Police & Fire Pension System. A majority of her time is spent upgrading Web Member Services for customers. Jaime has been with LRS for 20 years.

Rhonda Nerison is a Senior Developer in PensionGold Version 1 Product Support who has provided daily support to customers for the last 20 years. In addition to supporting these Version 1 customers, Rhonda worked with the Retirement Solutions Implementations team to assist with the conversion of the City of Austin Employees' Retirement System to PensionGold Version 3. Rhonda will eventually be responsible for supporting this new Version 3 customer.

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.

Luke Paben is the Technical Lead for the PensionGold Version 3 Product Support group. He holds a B.S. in Computer Science and Mathematics from Illinois College. In addition to day-to-day development support for our Version 3 customers, Luke supports and encourages best development practices, standardizes procedures, and performs quality assurance. He has been with LRS since 2011.

Mike Plunkett is a Senior Product Support Specialist for the PensionGold Version 2 Product Support team. Mike has worked in LRS Retirement Solutions 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 the Team Lead for the PensionGold Version 3 Product Support. Jeff formerly worked as a Business Analyst and has been with the Version 3 Product Support Team 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.

Shannon Rennecker is a Senior Product Support Developer who has been with LRS Retirement Solutions since 2000. During that time, she spent several years each on the PensionGold Version 2 Product Support Team, the PensionGold Version 3 Research and Development Team, and the PensionGold Version 3 Product Support Team. In 2013, she returned to the PensionGold Version 2 Product Support Team, where she currently provides analytical support and technical solutions for all Version 2 customers.

John Sams is a Senior Retirement System Specialist for PensionGold Version 2 Product Support who has provided daily support to customers for the last 20 years. John's customers include one fund with Web Member Services and Web Forms, and one with PG Secure Platinum. John joined Version 2 Product Support after 10 years as a Senior Application Specialist in PensionGold Version 1 Product Support. Before coming to LRS, John worked for Identix in Springfield, a provider of biometric identification systems and services.

Rase Sherwood is a Business Analyst for the PensionGold Version 3 Support team. Rase has been with LRS Retirement Solutions since 2006. Prior to coming to LRS, Rase worked for the Teachers' Retirement System of the State of Illinois where he worked as a Claims Manager and a Member Accounts Manager.

Sally Soderberg is a Software Test Analyst on the Product Research and Development team, providing testing and quality assurance on the PensionGold Version 3 base product and extensions. Prior to joining LRS Retirement Solutions in November 2016, Sally worked for Teachers' Retirement System (TRS) of the State of Illinois for nearly 30 years, retiring as the system's Deputy Executive Director.

Laura Soehnlin 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 Software Developer in the PensionGold Version 3 Product Support group. He holds a B.S. in Computer Science from Illinois College and is a Microsoft Certified Professional. In addition to providing day-to-day development support to PensionGold customers, Phil has been heavily involved with keeping all of the Version 3 customers up to date with the latest features. He has been with LRS since 2014.

