PENSIONGOLD
TEAMING CONFERENCE

October 8 – 10, 2024

Conference Locations:

Levi, Ray & Shoup, Inc.
Corporate Headquarters
2401 W. Monroe Street, Springfield, Illinois

and

Bank of Springfield (BOS) Center
1 Convention Center Plaza, Springfield, Illinois

~ ~ ~ ~ ~ ~ ***FINAL AGENDA*** ~ ~ ~ ~ ~ ~

As of October 3, 2024

LRS Retirement Solutions
PensionGold Teaming Conference
October 8-10, 2024
Agenda

Day 1 – Tuesday, October 8th – at LRS

7:30 AM – 8:30 AM

Registration Check-In and Breakfast at LRS

8:30 AM – 9:50 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 and will have an opportunity to get acquainted with their fellow conference participants.

10:05 AM – 11:05 AM

Product Update – Version 3 & 4 *(Session 2)*

Presented by Justin Long and Laura Soehnlin

Join the Product Development team for a review of recent and planned development activities with PensionGold Version 3 and 4.

Product Update and Customer Suggestions - Version 2 *(Session 3)*

Presented by Bob Blythe, Mark Luebkemann, Jaime Miers, Christina Pearcy, and Shannon Rennecker

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. *The first day of the conference (Day 1) and the optional day (Day 3) have timeslots allocated for these meetings.*

11:15 AM – 12:05 PM

PensionGold Security Panel Discussion *(Session 4)*

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.

Retirement Solutions 101 *(Session 9)*

Presented by Jeff Proffitt and Matt Muller

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.

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

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12:05 PM – 1:15 PM

Lunch

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

12:45 PM

Campus Mini-Tour *(Session 24)*

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.

1:15 PM – 2:30 PM

"Great Service – Less Paper" Panel Discussion *(Session 5)*

Moderated by John Katalinich. Customer panelists include: Amy McInerny of SBCERA, Breanna Newsome of GRS, and Missie O'Neal of ERFC.

Reducing the use of paper within the retirement office is a reality for many organizations. Cost effective and readily available technology for areas such as electronic correspondence, forms management, and front-end scanning can virtually eliminate the use of paper when completing member administration processes. What strategies are being used to reduce or eliminate the use of paper while maintaining a high level of customer service? Three customer panelists will share information from their organizations, and our moderator, John Katalinich, will be encouraging input and discussion from the audience.

2:40 PM – 3:30 PM

Customer Product Suggestions Roundtable – All Versions *(Session 6)*

Moderated by Dan McCain, Laura Soehnlin, Trevor Donahue, and Bob Blythe

Here's your chance to take the mic and share your ideas for future PensionGold product features and enhancements. This session is open to customers running any version of PensionGold.

3:45 PM – 4:45 PM

PensionGold Version 4 Demo *(Session 7)*

Presented by Laura Soehnlin

Whether you are currently implementing Version 4, thinking about an upgrade, or just curious what it looks like, join the Product Development team for a look at the latest version of PensionGold. Submit your suggestions early if there is something specific you would like to see demonstrated.

Correspondence and Electronic Document Management / Imaging Roundtable *(Session 13)*

Moderated by Aaron Bessie and Phil Sporcich

LRS Retirement Solutions will facilitate this session encouraging open discussion on using electronic document imaging systems. Share, listen, and interact with other funds to learn about best practices with EDM systems along with ideas for extending PageCenterX® (PCX) beyond member documents. Submit your questions early for this interactive session.

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.

6:00 PM – 9:00 PM

Teaming Conference Reception – Erin's Pavilion at Southwind Park, Springfield, IL *(Shuttle departs hotel: 5:45 and 6:00)*

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 at Erin's Pavilion. Join us for food, drinks, and fun!

Casual attire is appropriate; in fact, you're invited to proudly wear your favorite sports team apparel at our "tailgate" reception. Spouses or significant others are welcome to attend.

Day 2 – Wednesday, October 9th – at BOS Center, downtown Springfield

6:00 - 8:30 AM

Breakfast at conference hotel – Lindsay's Restaurant

8:30 AM – 10:40 AM

Discussion Tables *(Session 11)*

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 LRS Retirement Solutions team. A tentative list of topics includes: Training New Staff, Contact & Activity Tracking with Members (i.e., surveys, voting, etc.), Kat & Tom's Table, Surviving an Audit, 1099 Processing, SMS Text for more than just 2FA, and Member Identification (beyond SSN).

10:50 AM – 11:50 AM

Artificial Intelligence (AI) – How could pension funds benefit? *(Session 12)*

Presented by Eric Johnson and Justin Long

Join the Product Development team as we discuss AI and actively seek input from customers on potential use cases for AI.

Online Retirement and Refunds *(Session 14)*

Presented by Alicia Rawlings and Chris Collins

The LRS Retirement Solutions Product Support team will demonstrate and discuss a few customer solutions enabling members to retire from the comfort of their homes, even in their pajamas. Electronic Signature alternatives will be part of this discussion.

Microsoft Excel Pivot Tables *(Session 6)*

Presented by Penny Morgan (of LRS EOM Training) and Shannon Rennecker

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

The New Google Analytics (GA4) *(Session 10)*

Presented by Andy Krug (of LRS Marketing) and Phil Sporcich

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 (MemberDirect or WMS).

11:50 AM – 1:00 PM

Lunch

A buffet lunch will be served at the BOS Center.

1:00 PM – 1:30 PM

Mini Session 6: MemberDirect – What Now? *(Session 15a)*
Presented by Jeff DeKoker and Andy DeGroot

Members of our Product Development and Implementations teams will share current and custom security strategies for enrollment and logging in to MemberDirect, providing funds some peace of mind when allowing members to update information such as tax withholding, mailing addresses, and direct deposit account information. Lexis/Nexis and additional enhancements will be discussed.

Mini Session 4: How did that happen? Using the PGV2 Audit Trail *(Session 16)*
Presented by Bob Blythe

There is a vast amount of information in the Version 2 Business Audit Trail that can answer questions related to who made a change, what did they change, and when did it happen. This session will help you learn how to efficiently navigate through the Business Audit Trail, understand what information is available and how you can find the information that's relevant to your needs.

1:00 PM – 1:30 PM

Mini Session 3: How did that happen? Using the PGV3-V4 Audit Trail *(Session 17a)*

Presented by Nolan Groenewold

There is a vast amount of information in the Version 3 Business Audit Trail that can answer questions related to who made a change, what did they change, and when did it happen. This session will help you learn how to efficiently navigate through the Business Audit Trail, understand what information is available and how you can find the information that's relevant to your needs.

Mini Session 2: What is a SOC Audit? Can LRS assist you with your Security Audit? *(Session 18)*

Presented by Peter Chenoweth and Mike Chestnut

A Systems and Organizations Controls Report (SOC 2) for LRS provides detailed information and assurance about our security, availability, and confidentiality controls. Learn from our Security Officer more about this report and how we assist customers with their security audits.

1:40 PM – 2:50 PM

PensionGold Customer Led Session *(Session 19)*

Moderated by Julie West of MPERS

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.

3:00 PM – 3:30 PM

Mini Session 6: MemberDirect – What Now? *(Session 15b)*

Presented by Jeff DeKoker and Andy DeGroot

Members of our Product Development and Implementations teams will share current and custom security strategies for enrollment and logging in to MemberDirect, providing funds some peace of mind when allowing members to update information such as tax withholding, mailing addresses, and direct deposit account information. Lexis/Nexis and additional enhancements will be discussed.

Mini Session 5: Modern Authentication for PensionGold Version 4 *(Session 20)*

Presented by Eric Johnson and Justin Long

PensionGold Version 4 now supports modern authentication methods, such as Microsoft Entra ID. Learn from the Product Development team what this is all about and how your organization might benefit.

Mini Session 3: How did that happen? Using the PGV3-V4 Audit Trail *(Session 17b)*

Presented by Nolan Groenewold

There is a vast amount of information in the Version 3 Business Audit Trail that can answer questions related to who made a change, what did they change, and when did it happen. This session will help you learn how to efficiently navigate through the Business Audit Trail, understand what information is available and how you can find the information that's relevant to your needs.

Mini Session 1: LRS IT Solutions and Cybersecurity *(Session 21)*

Presented by Chris Hill of LRS IT Solutions

Join our LRS IT Solutions team for an introduction to our professional services and cutting-edge solutions. Addressing security concerns can be daunting, but this session will showcase our dedicated team of security experts who can help you develop a robust risk management strategy. We collaborate with various retirement and pension fund organizations, assisting them in identifying and addressing security issues throughout their operations.

3:45 PM – 4:30 PM

Closing Session *(Session 22)*

We will wrap up the formal portion of our PensionGold Teaming Conference with a final session, late on Wednesday afternoon (Day 2). 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. *(See Day 3 sessions on the next page.)*

Day 3 – Thursday, October 10th *(optional)* – at LRS

7:30 AM – 8:30 AM

Continental Breakfast at LRS

8:30 AM – 9:30 AM

Campus Tour *(Session 26a)*

Take a 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.

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. *The first day of the conference (Day 1) and the optional day (Day 3) have timeslots allocated for these meetings.*

9:45 AM – 10:45 AM

Campus Tour *(Session 26b)*

Take a 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.

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 – 10:45 AM

Small Group Sessions *(Sessions 25a-25k)*

Dependent upon customer input and interest, most or all of the following sessions will be scheduled for Thursday morning at either 8:30 or 9:45. **Times and room assignments will be available on Wednesday afternoon.**

If you're interested in diving deeper into any of these topics or prefer to work closely with our LRS Retirement Solutions team to address your specific questions, these focused small group sessions provide the perfect opportunity to gain practical experience.

Technical Track

- 25a: Email delivery confirmation with SendGrid, *with Aaron Bessie*
- 25b: Vulnerability/Intrusion Scanning, *with Mike Chestnut*
- 25c: Benefits of a Hosted Environment, *with Mike Chestnut and Paul Tarr*
- 25d: EmployerDirect First Look (v4), *with Jeff DeKoker and Tamara Goulet*. EmployerDirect has been re-developed from the ground up for Version 4. Join us for a first look at our new self-service portal for employers.
- 25e: Encrypted Secure File Transfer (ACH, Transmittal, etc.), *with Chris Ose, Karlee Kuntzman, and others.*

Business Track

- 25f: Online Retirement Processing, *with Product Support Staff*
- 25g: Explore PensionGold Features, *with Product Support Staff*
- 25h: AgilePoint Workflow, *with Troy Higginbotham and Kerry Burns*
- 25i: SSRS, Wyn, or DataDirect Reporting, *with Peter Chenoweth, Tristan Ropac, and Product Support Staff*
- 25j: Customer Portal, *with Lane Fowler*
- 25k: Template Editor, *with Kerry Burns and Product Support Staff*

*Prior to and on the first day of the conference, you'll have the chance to **sign up for the Day 3 topics** that pique your interest. Watch for a survey to come your way via email!*