



PensionGold® Teaming Conference 2026

DRAFT AGENDA as of July 22

You are welcome to attend any session regardless of which version of PensionGold your retirement system is currently using or implementing.

General Sessions

□ **Getting Started: Welcome and Conference Overview**

Welcome to the Annual PensionGold Teaming Conference as we celebrate the 100th anniversary of the iconic Route 66 Mother Road! 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.

□ **Moving Down the Mother Road with PensionGold: Empower Your Plan Members (Customer Panel Discussion) All Versions**

Just like the fun and unique roadside attractions along Old Route 66, this year's panel discussion has a variety of stops along the way. Hear how public pension funds are approaching Artificial Intelligence, including office policies, day-to-day use, and expectations for business partners. The panel will also discuss how organizations are securely expanding online tools through MemberDirect to better support plan members through important life events. Learn about features added to enhance self-service capabilities and hear real-world experiences balancing convenience with security. Buckle up and join us for the journey.

□ **Protecting the Journey: Security Best Practices All Versions**

Join the Product Support team as our experts share security best practices for the PensionGold suite of products. This valuable session highlights key security features across PensionGold and MemberDirect and underscores the importance of safeguarding member data. As we continue cruising down Route 66, we will also make a pit stop to review recent NACHA rule amendments related to ACH fraud monitoring and discuss how these changes can help protect retirement payments and member information.

□ **Moving Forward: Azure Hosting and What's Ahead All Versions**

This session provides updates from both the Retirement Solutions team and LRS Hosting Solutions, offering insight into Azure hosting with LRS. Attendees will learn about the benefits of hosting with LRS, including the proactive Annual Support Checkup provided to every hosted customer. The

session will also cover the migration journey from Flexential to Azure, along with what lies ahead as we continue down the road of modernization.

- **Getting Started with LRS Retirement Solutions All Versions**
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 as we help guide customers along their PensionGold journey. You'll gain valuable insights into our support structure, available resources, and how our teams work together behind the scenes, including an overview of Product Development processes and how Base Action Items are applied. Whether you're just starting your trip or have been traveling with PensionGold for years, this session will help you get oriented for the road ahead.
- **Navigating the Transition to IRIS All Versions**
With the IRS rolling out its new IRIS system, this session explores its impact on the 1099-R filing process. We'll recap highlights from our customer webinar in May, share how PensionGold is evolving to support the transition, and answer questions to help you navigate the road to IRIS compliance with confidence.
- **Managing the Journey: Correspondence and Document Management (Roundtable Discussion) All Versions**
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. Bring your ideas, questions, and stories from the road as we discuss how organizations are modernizing document management processes and reducing paper along the way.
- **PensionGold Version 2: Ask the Experts Version 2**
Bring your questions, ideas, and feedback to this interactive session focused on PensionGold Version 2. Whether you're curious about existing features, exploring future possibilities, or looking for guidance from others traveling a similar path, this is your opportunity to engage directly with LRS Product Support experts and peers from other pension funds. Share experiences, discuss challenges, and collaborate to help keep your PGv2 journey moving smoothly.
- **Expanding Member Portals: Customer Enhancements in Action Version 3**
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 as organizations continue expanding online services for their members. Hear how customers are adding new features and improving the digital experience for members along the way.
- **Expanding PensionGold: Customer Enhancements in Action Version 3**
The Product Support team will present a variety of customer-requested enhancements that may benefit other pension funds. 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 as customers continue modernizing their day-to-day operations. Join us to see how these enhancements are helping organizations move further down the road of innovation.

- **Navigating Ad Hoc Reporting Options Versions 3 and 4**
Semantic models, WynReports, DataDirect, and PowerBI. Confused about ad hoc reporting options? Not sure where to start? Curious about where PensionGold ad hoc reporting is headed? This session will help guide you through the reporting landscape as we demonstrate the different tools in use by PensionGold customers today and take a look at future reporting possibilities down the road. Whether you're just getting started or looking to explore a new route, this session will help point you in the right direction.
- **Exploring PensionGold Version 4 Version 4**
Join us for a demonstration of PensionGold Version 4 as we showcase key features, usability improvements, and enhancements designed to support your organization's journey forward. Whether you're already planning your move to PGv4 or simply exploring, this session will help you get familiar with the road ahead.
- **MemberDirect V4: Portal Requests and Online Retirement Version 4**
Join us for a demonstration of the new Portal Requests and Online Retirement functionality available in MemberDirect Version 4. See how these features help streamline retirement processes and expand online self-service capabilities as customers continue moving toward a more connected digital experience.
- **MemberDirect V4: Next Steps for Portal Requests Version 4**
Building on the Portal Requests framework introduced in the previous session, discover how Beneficiary Designations and Post-Employment Options can be completed online, further expanding the member self-service journey.
- **AI Meets PensionGold: From Concept to Reality Version 4**
Last year during the conference we explored what was possible and this year we're showcasing AI functionality now in production. Join us for a demonstration of the first developed AI features in Version 4 and see how PensionGold continues driving innovation forward on the road ahead.
- **Sharing Ideas and Best Practices (Discussion Tables) All Versions**
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. Much like travelers sharing stories along the Mother Road, this session is designed to encourage collaboration, new ideas, and practical takeaways from fellow PensionGold users. Sample topics include:
 - Training New Staff
 - Kat & Shawn's Table
 - Death Auditing Practices
 - Verifying Members by Phone

- How to increase MemberDirect Enrollment
 - Seminars (in-person or virtual) and calendar integration
 - Office use of AI
 - SMS for more than just logins
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- **Mini-Session 1: Understanding the Lifecycle of a PIR All Versions**
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. Follow the path of a PIR as it travels from idea to implementation along the PensionGold road map.

 - **Mini-Session 2: Tracking Data Changes: Audit, Activity, and History Versions 3 & 4**
This session explores how PensionGold tracks and presents data changes across the system. We'll look at Audit, Activity, and History features, their intended use cases, and how each supports using the "right tool for the job" when understanding what changed, when, and why. Join us as we navigate the different routes available for researching and reviewing system activity.

 - **Mini-Session 3: MemberDirect Security Features Versions 3 & 4**
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 help keep member information secure and protected throughout every step of the online journey.

 - **Mini-Session 4: What's New in PageCenterX All Versions**
Explore the latest features in PageCenterX, including a cleaner login experience with Modern Authentication enabled, drag-and-drop file uploads, sensitive data field masking, and more. See how these enhancements help streamline your imaging workflow and keep your organization moving forward efficiently.

 - **Mini-Session 5: Securing PensionGold: Technical Updates and Best Practices All Versions**
Building on previous Teaming Conference sessions centered on PensionGold security, this session delivers technical updates. Example topics include hosting, intrusion testing, SOC 2 compliance, PGSecure, and related security initiatives.

 - **Mini-Session 6: MemberDirect: A Mobile-First Approach Versions 3 & 4**
Take a closer look at how we apply mobile-first design in practice. This session covers the principles, trade-offs, and design decisions that guide the creation of intuitive and effective mobile user experiences as more members access services while on the go.

 - **Mini-Session 7: MemberDirect: Seeing Data Differently Version 4**
Discover new ways MemberDirect presents and organizes information to improve the member experience. This session explores design concepts, usability considerations, and approaches that help users better navigate and understand their data throughout their online experience.

- **Mini-Session 8: Data Evaluation for PensionGold All Versions**
Data quality is a critical mile marker on the road to successful implementation projects, where inaccuracies or gaps can create significant detours. In this session, LRS shares how its experience with system installations and upgrades helps assess data health, identify potential issues early, and keep projects moving in the right direction. Focused on PensionGold Version 3 and Version 4 data, the session highlights approaches for evaluating accuracy, reliability, and usability while uncovering risks, process gaps, and inefficiencies. Attendees will gain insight into how a structured data evaluation can improve decision-making, enhance the user experience, and provide a solid foundation for data cleansing and conversion planning as they continue their journey down the Mother Road.
- **1-on-1 Meetings: Personalized Time with the Retirement Solutions Team All Versions**
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 discuss current challenges, plan for upcoming projects, explore future enhancements, or simply connect with the people helping support your PensionGold journey. Many attendees consider these conversations one of the most valuable stops of the conference.
- **Teaming Conference Reception: Motorheads Bar & Grill, Museum, & Entertainment Complex**
Join fellow attendees for an evening of conversation, networking, and fun as we celebrate another day on the PensionGold journey. This relaxed reception is a great opportunity to connect with other customers and the Retirement Solutions team while enjoying the spirit of the Mother Road.
- **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 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. Before we reach the end of the road, join us one last time to celebrate the journey and look ahead to what's next.

Optional Sessions (Thursday Morning / Day 3)

- **Cruising into PGv4: Migration Insights for PGv2 and PGv3 Customers**
Join the Implementations team as they share experiences and key takeaways from customer migrations from PensionGold Version 2 or 3 to Version 4. Hear lessons learned, common challenges, and practical guidance to help prepare for your own journey. Bring your questions for this interactive discussion.
- **Online Retirement in Action**
Join the Product Support team for a closer look at MemberDirect v3 Online Retirement Processing customizations currently in production environments. Hear how customers are using this feature and participate in an open discussion with questions and shared experiences.
- **Getting Started with AgilePoint Workflows**
Interested in business workflow automation? This session introduces AgilePoint and how

workflows can support business processes and improve efficiency. Bring your questions and connect with our experts to explore possibilities.

- **PowerBI Questions and Use Cases**

Bring your questions and suggestions as our Database Administrator and Product Support team help explore PowerBI use cases within your environment. This interactive session is a great opportunity to discuss ideas, reporting needs, and practical applications.

- **Wyn Reporting: Questions and Use Cases**

Bring your questions and suggestions as our Database Administrator and Product Support team discuss Wyn Reporting and how it can be used within your environment. Explore reporting ideas, use cases, and opportunities with our experts.

- **DataDirect Reporting: Questions and Use Cases**

Bring your questions and suggestions as our Database Administrator and Product Support team discuss DataDirect use cases and reporting scenarios within your environment. Learn more about how DataDirect can support your reporting needs.

- **Template Editor: Tips, Tricks, and Q&A**

Join the Product Support team as we demonstrate helpful Template Editor tips and techniques. We'll also leave plenty of time for questions and discussion to help you get the most from Template Editor.

- **Understanding Disaster Recovery and PGSecure**

Join our team for an open discussion on LRS Hosting, Disaster Recovery, and PGSecure services. Learn how these solutions work together and ask questions about planning, preparedness, and business continuity.