



PensionGold® Teaming Conference 2023

FIRST DRAFT AGENDA as of 6-23-2023

(A more detailed version will be available before 7-31-2023.)

Sessions:

PensionGold Version 3 / Version 4

- ☐ **Product Update**
- ☐ **PensionGold Does That?**
- ☐ **Customizations and Enhancements**

PensionGold Version 2

- ☐ **Product Update**
- ☐ **PensionGold Does That?**

General Sessions

- ☐ **Welcome and Introductions**
- ☐ **1-on-1 Meetings**
- ☐ **Customer Led Session**
- ☐ **Product Suggestions Roundtable** (all versions)
- ☐ **Retirement Solutions 101**
- ☐ **Microsoft Excel Tips and Tricks**
- ☐ **The New Google Analytics (GA4)**
- ☐ **Product Lab**

- **Engage Your Membership (Panel Discussion)**
- **Campus Tours**
- **Roundtable Discussions** (multiple 20 minute sessions, wide range of topics)
- **Electronic Document Management/Imaging Roundtable**
- **Workflow and Correspondence Roundtable**
- **PensionGold Version 4 Demo**
- **PensionGold Security Panel Discussion**
- **Teaming Conference Reception** (Evening of Oct. 3)
- **Closing Session**

