



PensionGold® Teaming Conference 2022

DRAFT AGENDA as of 8-03-2022

Sessions

Version 3

- ❑ **Product Update (Version 3)**
Join the Product Development team for a review of recent and planned development activities with PensionGold Version 3.
- ❑ **Product Suggestions Roundtable (Version 3)**
This session has been reserved to give conference attendees an opportunity to provide feedback regarding the PensionGold Version 3 product and services. It's a forum for customers to present ideas and suggestions for product features and enhancements that may not already be planned for 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.
- ❑ **Template Editor (Version 3) [to be held on the optional 3rd day of the conference]**
Are you new to working with correspondence templates in PensionGold Version 3? Or do you simply need a refresher? This session will get you up to speed on using the Template Editor and its newest features.
- ❑ **Ad Hoc Reporting Tools Comparison [to be held on the optional 3rd day of the conference]**
Join us for a conversation on the state of business intelligence within PensionGold Version 3. This session will provide a comparison of the tools available, demonstrating the power and ease of use each one offers.
- ❑ **PensionGold Does That? (Version 3)**
Have you ever wondered if you're getting all the value out of your PensionGold software? Often, we find there are features and functionality that are available in our products, but some of our customers don't realize they exist. This session will provide an overview of some of the most commonly unknown features and functionality available in the products. Come find out what you didn't know so you couldn't ask, tips for using the product, or even ways to be more efficient in your daily activities.

Version 2

- **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 Suggestions Roundtable (Version 2)**

This session has been reserved to provide conference attendees an opportunity to provide feedback regarding the 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.

- **PensionGold Does That? (Version 2)**

Have you ever wondered if you are getting all the value out of your PensionGold software? Often, we find there are features and functionality that are available in our products, but some of our customers don't realize they exist. This session will provide an overview of some of the most commonly unknown features and functionality available in the products. Come to this session to find out what you didn't know so you couldn't ask, tips for using the product, or even ways to be more efficient in your daily activities.

General Sessions

- **Welcome and Introductions**

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 break into small groups and get the chance to "put a name with a face" for the many Retirement Solutions Product Support team members as well as providing an opportunity to get acquainted with their fellow conference participants.

- **1-on-1 Meetings**

Attend pre-scheduled meetings with Management, your Product Support 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.

- **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.

□ **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 Retirement Solutions Product Support team, plan to attend this informative session.

□ **QA and Testing 101**

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.

□ **Managing Your Public Website**

In this session, the LRS Web Solutions team will provide an overview of usability, accessibility, and other important factors to consider when developing or updating a web site. They will also showcase current LRS pension fund customers' websites.

□ **Product Lab** *[to be held on the optional 3rd day of the conference]*

Are you curious about enhancements to the PensionGold products? 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 Development team and our Product Support team on hand and available to assist you and answer your questions. 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.

□ **"Impact of the Pandemic on Retirement System Operations" (Panel Discussion)**

With the nationwide quarantine in the rearview mirror, our Panel Discussion will focus on how the pandemic impacted our customers' business operations. We will cover lessons learned, outcomes (positive or negative), new or modified policies, temporary and permanent changes to overall operations, etc. Three customer panelists will share information from their organizations, and the moderator, John Katalinich, will be encouraging input and discussion from the audience.

□ **Campus Tours**

Sign up for 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.

□ **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 BCP/Disaster Recovery, Vulnerability Scanning, Imaging/Barcoding/Scanning, Withholding Changes, Death Audit Verification, and Member Servicing.

□ **PensionGold Version 4 First Look**

In this session, the Retirement Solutions Product Development team will provide an early look at PensionGold Version 4. Attendees will get to see the new user interface as they learn about some of the differences and additional features available with Version 4.

□ **CyberSAFE Security Awareness**

End-user security awareness is a major issue in the business world today. The threat landscape is complicated, and typical end users are unaware of the ways in which they could adversely affect their organization. Our LRS Education Services resident cybersecurity trainer will teach you how to identify many of the common risks associated with phishing, passwords, worms, ransomware, and how to be more secure in all kinds of ways. This will be an educational time, but we also want to make it engaging and fun.

□ **PensionGold Security**

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.

□ **The “Kat Chat”** *[to be held on the optional 3rd day of the conference]*

After the formal Teaming Conference sessions are behind us, this will be a time sit back and talk about general pension industry topics. John “Kat” Katalinich will be leading the session and get the discussion going with his Top 10 list of what we have been hearing from our customers and other retirement systems around the country. Please feel free to suggest a topic you believe will be of interest to other attendees.

□ **Teaming Conference Reception – at the LRS Hangar, Springfield Capital Airport**

(Tuesday evening) 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 the LRS Hangar. Join us for food, drinks, and fun! You’ll be able to satisfy your “need for speed” cruising the Levi car and motorcycle collection and can brave the “danger zone” with an optional tour of the nearby Air Combat Museum.

□ **Closing Session**

We will wrap up our PensionGold Teaming Conference with a final session, late on Wednesday afternoon. 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.