PENSIONGOLD®
TEAMING CONFERENCE

October 4 – 6, 2022

**"...Soaring to New Heights
with PensionGold..."**

Conference Location:
Levi, Ray & Shoup, Inc.
Corporate Headquarters

2401 W. Monroe Street
Springfield, Illinois

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Agenda
As of August 8, 2022

Tuesday, October 4th

7:30 AM – 8:30 AM

Registration Check-In and Breakfast at LRS

8:30 AM – 9:55 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 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.

10:10 AM – 11:00 AM

Product Update – Version 3 *(Session 18)*

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

Product Update - Version 2 *(Session 15)*

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.

11:10 AM – 12:00 PM

Retirement Solutions 101 *(Session 3)*

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 *(Session 4)*

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 *(Session 5)*

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.

12:00 PM – 1:15 PM

Lunch

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

12:45 PM – 1:05 PM

Campus Tour *(Session 11a)*

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. *(Note: Same as the tour offered at 2019 conference.)*

1:15 PM – 2:30 PM

"Impact of the Pandemic on Retirement System Operations" (Panel Discussion) *(Session 2)*

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.

2:45 PM – 3:30 PM

PensionGold Does That? – Version 3 *(Session 19)*

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.

PensionGold Does That? – Version 2 *(Session 16)*

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.

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

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.

3:45 PM – 5:00 PM

PensionGold Version 4 First Look *(Session 6)*

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.

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

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6:00 PM – 9:00 PM

Teaming Conference Reception – LRS Hangar, Springfield Capital Airport *(Shuttle departs hotel: 6:00 and 6:10)*

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.

Casual attire is appropriate. Spouses or significant others are welcome to attend. *(Please be sure to note their plans to attend when you submit your registration).*

LRS Retirement Solutions
PensionGold Teaming Conference
October 4 – 6, 2022
Agenda

Wednesday, October 5th

7:30 AM – 8:30 AM

Breakfast at LRS

8:30 AM – 9:30 AM

Customer Product Suggestions Roundtable – Version 3 *(Session 20)*

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.

Customer Product Suggestions Roundtable – Version 2 *(Session 17)*

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.

9:45 AM – 11:45 AM

Roundtable Discussions *(Session 7)*

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.

11:45 AM – 1:00 PM

Lunch

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

12:30 PM – 12:50 PM

Campus Tour *(Session 11b)*

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. *(Note: Same as the tour offered at 2019 conference.)*

1:00 PM – 2:00 PM

PensionGold Customer Led Session *(Session 8)*

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.

2:15 PM – 3:15 PM

CyberSAFE Security Awareness *(Session 9)*

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.

3:25 PM – 4:20 PM

PensionGold Security *(Session 10)*

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.

4:30 PM – 5:00 PM

Closing Session *(Session 12)*

We will wrap up the formal portion 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.

(Note: Optional sessions taking place the morning of Thursday, October 6th, are shown on the following page.)

Thursday, October 6th (optional)

7:30 AM – 8:30 AM

Continental Breakfast at LRS

8:30 AM – 9:30 AM

PensionGold Product Lab *(Session 13a)*

Are you curious about enhancements to the PensionGold products? Are you a 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 first-hand view of the new functionality. Take some time to explore PensionGold Version 2 or 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. 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.

Ad Hoc Reporting Tools Comparison – Version 3 *(Session 22)*

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.

The "Kat Chat" *(Session 14)*

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.

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

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

PensionGold Product Lab *(Session 13b)*

See description shown for 8:30 AM session.

Template Editor – Version 3 *(Session 21)*

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.

Campus Tour *(Session 11c)*

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. *(Note: Same as the tour offered at 2019 conference.)*

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

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Thank you for attending the 2022 PensionGold Teaming Conference!