# PENSIONGOLD®

## TEAMING CONFERENCE

**LRS®**
*RETIREMENT SOLUTIONS*

**2022**

## Welcome Back!

Thank you for attending the 2022 PensionGold® Teaming Conference. We are happy to be able to offer an in-person experience this year! Having to forgo travel and miss out on the in-person experience the last two years, just like Maverick in the newly-released Top Gun movie, we hope you are ready to "Soar to New Heights with PensionGold" this year.

Our goal year after year is to make the Teaming Conference valuable for everyone, whether you are a regular, occasional, or new attendee and whether you have an older version of PensionGold or our newest one. That means providing you with the latest information on our software products, relevant technical developments, and other information pertinent to our customers. To learn what great topics we will present at this year's conference, check out the agenda on our mobile app (https://guidebook.com/g/2022pgoldtc; passphrase = pgtc2022) -- or locate the 2022 PensionGold Teaming Conference program book in PDF form at https://www.lrsretirementsolutions.com/Teaming-Conference-login (username = teaming; password = pgold99).

Regarding this year's schedule, we switched it up and decided to try something different to allow for various travel options. We have packed several sessions into two full days which allows us to wrap up the formal portion of the conference at 5:00 PM on Wednesday; Thursday morning offers optional sessions, primarily product labs offering you an opportunity to get answers to specific product questions or take a closer look at features in our products with assistance from our team. We hope this schedule will allow for the flexibility you need while still providing a great deal of content. If you are in no hurry to leave, don't hesitate to stick around an extra night to enjoy some of our historic sites or local restaurants.

The opportunity for you to meet and interact with our team members face-to-face and chat with your peers is one of the key benefits of our conference. While you are here, please plan to join us at the LRS Hangar for the Teaming Conference Reception on Tuesday evening, which provides networking opportunities with your peers in a casual setting. You can kick back and relax with great food and drinks of course! You'll also 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. Who knows... you might even take your chances in a paper airplane contest!

Every year, we look forward to seeing each of you at the conference and spending valuable time together.
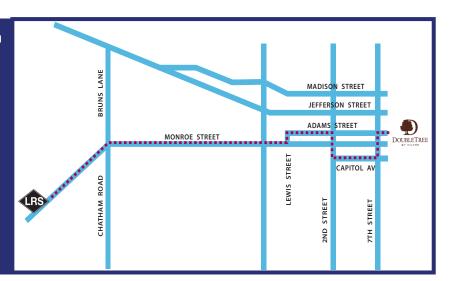
Thank you for choosing LRS, our PensionGold products, and for joining us at the 2022 PensionGold Teaming Conference!

*Tom*

Tom Chesser

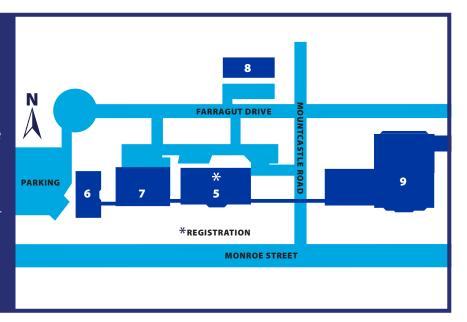*Defining tomorrow.  Delivering today.*

# Maps & Shuttle

## HOTEL TO LRS CAMPUS

1. Go West on E. Adams toward S. 7th
2. Turn left at S. 7th St.
3. Turn right at E. Capitol Ave.
4. Turn right at S. 2nd St.
5. Turn left at E. Adams St.
6. Turn left at S. Lewis St.
7. Turn right at W. Monroe St.
8. LRS on right at 2401 W. Monroe St.
9. Park near Bldg. 6, and follow the sidewalk to Bldg. 5



## LRS CAMPUS

### Parking at the LRS Campus

If you drive to the LRS campus versus taking our shuttle from the hotel, please park at 2451 W. Monroe Street (watch for our PensionGold Teaming Conference parking signs). This is the surface parking lot just outside of LRS Building 6. Note that conference registration and check-in is located in LRS Building 5 at 2401 W. Monroe Street (a short 3-minute walk from the parking lot).
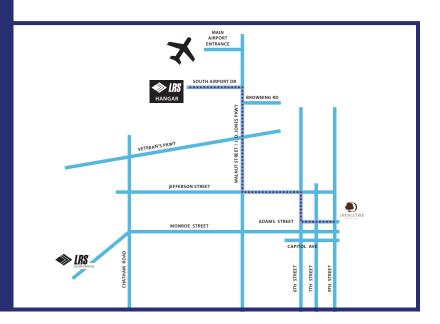
## SHUTTLE SCHEDULE

**TUESDAY 10/4:**  DoubleTree - President Abraham Lincoln Hotel Departures 7:15 am and 7:45 am;
Return to the hotel 15 and 45 minutes after last session.

**WEDNESDAY 10/5:**  DoubleTree - President Abraham Lincoln Hotel Departures 7:15 am and 7:45 am;
Return to the hotel 15 and 45 minutes after last session.

**THURSDAY 10/6:**  DoubleTree - President Abraham Lincoln Hotel Departures 7:15 am, 7:45 am and 8:00 am;
Return to the hotel 15 and 45 minutes after last session.

## TO LRS HANGAR

1. From DoubleTree - President Abraham Lincoln Hotel, proceed WEST on Adams to 6th Street.

2. Follow 6th Street NORTH, to Jefferson Street.

3. Turn LEFT and proceed WEST to Walnut Street / J.D. Jones Pkway

4. Turn RIGHT, proceed NORTH to South Airport Drive.

5. Turn LEFT and proceed to the LRS Hangar



## CONTACTS

**Tom Chesser**
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**Dan McCain**
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**John Katalinich**
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**LRS (Julie Milner)**
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**Jeff Proffitt**
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**Leah Hardy**
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**Max Dillahunty (Shuttle)**
217-793-3800, ext. 1304

**Lincoln Yellow Cab**
217-523-4545

**DoubleTree - President Abraham Lincoln Hotel**
217-544-8800

# Frequently Asked Questions

## How do I connect to the LRS Wi-Fi?

Wi-Fi is available throughout the LRS campus. Join the "LRSGuest" network by using self-registration with your email address or cell phone number. After you enter the registration code, which is 1979, you will receive login credentials.

## How do I download the mobile app?

Stay up to the minute with our mobile app, powered by Guidebook. Scan the QR code or navigate to https://guidebook.com/g/2022pgoldtc/ and use the passphrase "pgtc2022".

## Where is the Internet Café?

If you need a laptop or printer during your time at the PensionGold Teaming Conference, you are welcome to use the Internet Café located just outside the Auditorium in the Building 5 Atrium.

## Is there a shuttle between the hotel and LRS?

Yes! For those of you who need a way to get to the LRS Campus from the conference hotel, we provide a shuttle van that will run between LRS and the DoubleTree - President Abraham Lincoln Hotel. There are scheduled pickups and drop-offs in the mornings (see Pg. 3) and afternoons for each day of the conference. You can locate the shuttle outside the main entrance at the hotel and outside Buildings 5 and 6 on the LRS campus. Jump on the shuttle if you need a ride; seats are available on a first come, first served basis.

Give the shuttle drivers a call if you need to be picked up or dropped off at the hotel outside of the scheduled times.

## Where can I park my vehicle?

If you drive to the LRS campus versus taking our shuttle from the hotel, please park at 2451 W. Monroe Street (watch for our PensionGold Teaming Conference parking signs). This is the surface parking lot just outside of LRS Building 6. Note that conference registration and check-in are located in LRS Building 5 at 2401 W. Monroe Street (a short 3-minute walk from the parking lot).

## Which sessions can I attend?

Each day offers General Sessions and product specific sessions. You will also find hands-on labs, and you may attend 1-on-1 meetings, too. Feel free to attend any session you choose. Please keep in mind that seating capacity is limited in some sessions.

## Are meals included?

Yes! You are welcome to start your morning with breakfast at the LRS Campus, in the Building 5 Atrium. Throughout the day you'll find snacks and beverages at locations near the sessions. Lunch will be served on Days 1 and 2 of the conference in the Building 5 Atrium with seating in the Auditorium and the Atrium.

## What is the Team Challenge?

During the 2022 PensionGold Teaming Conference, each conference attendee will be assigned to a team. The teams are in competition to win awards which will be presented at Wednesday afternoon's Closing Session. Most of the activities related to the Team Challenge are focused on this year's theme: *Top Gun: Soaring to New Heights with PensionGold.* Our goal is to create more opportunity for interaction between our attendees and have a little fun at the same time. It's a Teaming Conference tradition!

# Conference Sessions

## 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)

*Presented by Justin Long, Laura Soehnlin & Eric Johnson*

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

## Product Update - Version 2 (Session 15)

*Presented by Dan McCain and Bob Blythe*

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)

*Presented by Jeff Proffitt & Dan McCain*

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)

*Presented by Shawn Farris, Christie Porter, & Nolan Groenewold*

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.

# Conference Sessions

## Managing Your Public Website (Session 5)

*Presented by LRS Web Solutions Team*

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.

## 1-on-1 Meetings (Session 25)

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.

### 12:00 PM – 1:15 PM
## Lunch

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

## 1-on-1 Meetings (Session 25)

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.

### 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 the 2019 conference.)*

### 1:15 PM – 2:30 PM
## "Impact of the Pandemic on Retirement System Operations" (Panel Discussion) (Session 2)

*Customer Panelists:*
*Rebekah Bardakos, Amy Burke, Teresa Cantu.*
*Moderated by John Katalinich*

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)

*Presented by Jacob Wind*
*& Sam Umbanhowar*

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)

*Presented by Mark Luebkemann & Steven Barnes*

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 25)

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)

*Presented by Justin Long, Laura Soehnlin & Eric Johnson*

Join the Product Development team for an early look at PensionGold Version 4. Attendees will get to see the new user interface, as well as learn about its technologies and features.

## 1-on-1 Meetings (Session 25)

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.

### 6:00 PM – 9:00 PM

## Teaming Conference Reception – LRS Hangar, Abraham Lincoln Capital Airport (Shuttle departs hotel: 6:00 & 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).*

# Conference Sessions

**7:30 AM – 8:30 AM**

## Breakfast at LRS

**8:30 AM – 10:40 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 Work Management, Tom's Table, BCP/Disaster Recovery, The Kat Chat, Document Management, Withholding Changes, and Member Servicing.

**10:50 AM – 11:50AM**

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

*Moderated by Alicia Rawlings, Laura Soehnlin, & Jeff Proffitt*

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)

*Moderated by Bob Blythe & Shannon Rennecker*

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.

**11:50 AM – 1:00 PM**

## Lunch

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

## 1-on-1 Meetings (Session 25)

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.

**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 the 2019 conference.)*

# Conference Sessions

**1:00 PM – 2:00 PM**

## PensionGold Customer Led Session (Session 8)

*Moderated by Amy Blomeley*

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)

*Presented by Troy Stoneking of LRS Education Services*

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.

## MemberDirect Updates (Session 24)

*Presented by Sheila Goldsberry*

Are you interested in the refreshed MemberDirect portal? Are you considering enhancing MemberDirect to allow for Retirement Application processing? In this session, our Product Support team will familiarize you with the latest version of MemberDirect as well as demonstrate a solution (enhancement) for processing online Retirement Applications.

**3:25 PM – 4:05 PM**

## PensionGold Security (Session 10)

*Presented by Peter Chenoweth, Mike Chestnut, & Phil Sporcich*

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.

**4:15 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 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.)*

# Schedule

## TUESDAY, OCTOBER 4

| ROOM | ROOM SIZE | 8:30-9:55 | 10:10-11:00 | 11:10-12:00 | 12:00-1:15 | 1:15-2:30 | 2:45-3:30 | 3:45-5:00 | 6:00-9:00 |
|---|---|---|---|---|---|---|---|---|---|
| Building 9 Classroom 307 (Access via Building 5) | 84 | #1 Welcome Session (Meet & Greet starts at 9:30) | #18 Product Update | | | #2 Impact of Pandemic on Operations (Panel Discuss) | #19 PensionGold Does That? | #6 Version 4 First Look | |
| Building 6 Classroom 1 (LAB) | 14 | | | #3 Retirement Solutions 101 | | | | | |
| Building 6 Classroom 5 (LAB) | 9 | | | | | | | | |
| Building 6 Classroom 7 | 35 | | | #4 QA & Testing 101 | | | | | |
| Building 6 Classroom 8 | 35 | | | #5 Managing Your Public Website | | | | | Teaming Conference Reception LRS Hangar |
| Building 5 Registration Desk | | | | | 12:45 #11A Campus Tour | | | | |
| Building 5 Atrium | | | | | | Lunch | #16 PensionGold Does That? | | |
| Building 5 Auditorium | 46+ | | #15 Product Update | | | | | | |
| Location TBD | | | | #25 1-On-1 Meetings | #25 1-On-1 Meetings | | #25 1-On-1 Meetings | #25 1-On-1 Meetings | |

## KEY

- 🟩 VERSION 2 & ADV
- 🟦 VERSION 3
- 🟪 V2, ADV, V3
- 🟥 GENERAL SESSIONS
- 🟨 MEALS

## WEDNESDAY, OCTOBER 5

| ROOM | ROOM SIZE | 8:30-10:40 | 10:50-11:50 | 11:50-1:00 | 1:00-2:00 | 2:15-3:15 | 3:25-4:05 | 4:15-5:00 |
|---|---|---|---|---|---|---|---|---|
| Building 9 Classroom 307 (Access via Building 5) | 84 | | #20 Product Suggestions Roundtable | | #8 Customer Led Session | #9 CyberSAFE Security Awareness | #10 PensionGold Security | #12 Closing Session |
| Building 6 Classroom 1 (LAB) | 14 | | | | | | | |
| Building 6 Classroom 5 (LAB) | 9 | | | | | | | |
| Building 6 Classroom 7 | 35 | | | | | | | |
| Building 6 Classroom 8 | 35 | | #17 Product Suggestions Roundtable | | | | | |
| Building 5 Registration Desk | | | | 12:30 • #11B Campus Tour | | | | |
| Building 5 Atrium | | | | Lunch | | | | |
| Building 5 Auditorium | 46+ | | #7 Roundtable Discussions | | | #24 Member Direct Updates | | |
| Location TBD | | | | #25 1-On-1 Meetings | | | | |

## KEY

- 🟩 **VERSION 2 & ADV**
- 🟦 **VERSION 3**
- 🟪 **V2, ADV, V3**
- 🟥 **GENERAL SESSIONS**
- 🟨 **MEALS**

# Schedule

## THURSDAY, OCTOBER 6

| ROOM | ROOM SIZE | 8:30-9:30 | 9:45-10:45 |
|---|---|---|---|
| Building 9 Classroom 307 (Access via Building 5) | 84 | | #23 Version 4 Q&A |
| Building 6 Classroom 1 (LAB) | 14 | #13A Product Lab (V2 & V3) | #13B Product Lab (V2 & V3) |
| Building 6 Classroom 5 (LAB) | 9 | #22 Ad Hoc Reporting Tools Comparison | #21 Template Editor |
| Building 6 Classroom 7 | 35 | | |
| Building 6 Classroom 8 | 35 | | |
| Building 5 Registration Desk | | #11C Campus Tour (8:30-8:50) | |
| Building 5 Atrium | | | |
| Building 5 Auditorium | 46+ | | |
| Location TBD | | #25 1-On-1 Meetings | #25 1-On-1 Meetings |

## KEY

- ■ VERSION 2 & ADV
- ■ VERSION 3
- ■ V2, ADV, V3
- ■ GENERAL SESSIONS
- ■ MEALS

**7:30 AM – 8:30 AM**

## Continental Breakfast at LRS

**8:30 AM – 9:30 AM**

## PensionGold Product Lab (Session 13a)

*Staffed by Leah Hardy, Jaime Miers, & Steven Barnes*

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 2 or 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.

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

*Presented by Peter Chenoweth*

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.

## 1-on-1 Meetings (Session 25)

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.

**8:30 AM – 8:50 AM**

## 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 the 2019 conference.)*

**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)

*Presented by Chris Collins*

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.

## PensionGold Version 4 Q&A (Session 23)

Was there something in the PensionGold Version 4 First Look session that you would like to hear more about? Do you have questions about planning for Version 4? Join the Retirement Solutions Management team and members of the Product Development team for a question-and-answer session.

## 1-on-1 Meetings (Session 25)

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.

**LRS RETIREMENT SOLUTIONS**
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