PENSIONGOLD® TEAMING CONFERENCE

October 3 – 5, 2023

Never Fold with PensionGold:
30 Years of Pension Software

Conference Location:

Levi, Ray & Shoup, Inc.
Corporate Headquarters

LRS®
RETIREMENT SOLUTIONS

2401 W. Monroe Street
Springfield, Illinois

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Agenda
As of August 15, 2023

LRS Retirement Solutions
PensionGold Teaming Conference
October 3 – 5, 2023
Agenda

Tuesday, October 3rd

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 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 & 4 *(Session 18)*

Presented by Justin Long, Laura Soehnlin, Eric Johnson, and Jeff DeKoker

Join the Product Development team for an update on recent and planned development activities affecting both Version 3 and Version 4.

Product Update - Version 2 *(Session 16)*

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. The session will also provide a forum for customers to present ideas, suggestions, or requests for product features and enhancements.

11:10 AM – 12:00 PM

Retirement Solutions 101 *(Session 3)*

Presented by Jeff Proffitt and Bob Blythe

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.

Microsoft Excel Tips & Tricks *(Session 4)*

Presented by Penny Morgan of LRS Education Services

Increasingly, large amounts of data from PensionGold are being imported into Excel on a regular basis. In this session, an instructor from LRS Education Services will demonstrate several powerful time-saving shortcuts to work with this data efficiently and accurately.

The New Google Analytics (GA4) *(Session 5)*

Presented by Andy Krug of LRS Web Solutions

Google Analytics is the enterprise-class web analytics solution that gives you rich insights into your website traffic and marketing effectiveness. Powerful, flexible, and easy-to-use features let you see and analyze your traffic data in an entirely new way. This session will give an overview of what GA4 provides, what value it can provide, and what it takes to get it included in your website (WMS or MemberDirect).

12:00 PM – 1:05 PM

Lunch

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

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

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

12:35 PM – 1:00 PM

Campus Tour *(Session 13a)*

Take 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 2022 conference.)*

1:05 PM – 2:20 PM

"Engage Your Membership" Panel Discussion *(Session 2)*

Customer Panelists: Rebekah Bardakos, Stacy Osborne-Fry, and 3rd panelist pending. Moderated by John Katalinich.

More and more effort is being made to engage membership participation, whether it is through electronic means or seminars. What are some the new ideas being used to continually encourage membership participation? Three customer panelists will share information from their organizations, and the moderator, John Katalinich, will be encouraging input and discussion from the audience.

2:35 PM – 3:20 PM

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

Presented by Sam Umbanhowar and Jacob Wind

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 17)*

Presented by Mark Luebkemann and Steven Barnes

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. The session will also provide a forum for customers to present ideas, suggestions, or requests for product features and enhancements.

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

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3:30 PM – 4:45 PM

PensionGold Version 4 Demo *(Session 6a)*

Presented by Laura Soehnlin

Join the Product Development team for a demonstration of PensionGold Version 4.

Customizations & Enhancements – Version 3 *(Session 20)*

Presented by Chris Collins and Alec Welch

Many different customizations have been implemented for Version 3 customers. These customizations can improve productivity, aid in financial balancing, increase security, and increase the amount of useful information available to the user. This session provides an overview of the customizations that are relevant to all Version 3 users as well as an explanation of the value each one provides.

6:00 PM – 9:00 PM

Teaming Conference Reception – Inn at 835 Conservatory, Springfield, IL *(Shuttle departs hotel: 5:55 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. You're invited to test your "poker face" at our **casino-themed reception** taking place on Tuesday night at the Inn at 835 Conservatory in Springfield. Join us for food, drinks, and fun!

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).*

Wednesday, October 4th

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: Member Identification other than SSN, Electronic Signatures, "The Tom & Kat Chat", DBA Checkup, Death Audit Processing, V4 Tech Talk, Training New Staff, and CyberSecurity with LRS IT Solutions.

10:50 AM – 11:50 AM

Customer Product Suggestions Roundtable – All Versions *(Session 9)*

Moderated by Laura Soehnlin, Trevor Donahue, and Bob Blythe

This session has been reserved to give conference attendees an opportunity to provide feedback regarding PensionGold products 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. This session is open to customers running any version of PensionGold.

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

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

11:50 AM – 1:00 PM

Lunch

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

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12:30 PM – 12:50 PM

Campus Tour *(Session 13b)*

Take 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 2022 conference.)*

1:00 PM – 2:00 PM

PensionGold Customer Led Session *(Session 8)*
Moderated by Customer (TBA)

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 – 3:05 PM

Correspondence and Electronic Document Management / Imaging *(Session 11)*

Presented by Missy Herrman, Aaron Bessie, and Phil Sporcich

Customers continue to look for ways to increase their use of the electronic document imaging system and correspondence features within PensionGold. Share, listen, and interact with other funds to learn about best practices LRS has implemented in recent years.

Workflow and Workload Management Roundtable *(Session 12)*

Presented by Tony Quiriconi, Troy Higginbotham, and Shawn Farris

Join Retirement Solutions team members as they facilitate this roundtable session which provides an opportunity for customers to share how they have managed work with various PensionGold functionality. Topics will include Workflows, Message Center, Contact Logs, Correspondences, and Milestones.

3:15 PM – 4:05 PM

PensionGold Security Panel Discussion *(Session 10)*

Presented by Peter Chenoweth, Mike Chestnut, and Phil Sporcich

This highly interactive session will provide a forum for LRS Retirement Solutions to share security best practice solutions for the PensionGold suite of products. Customers are encouraged to join the conversation and seek advice from others in attendance.

4:15 PM – 5:00 PM

Closing Session *(Session 14)*

We will wrap up the formal portion of 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 5th, are shown on the following page.)

Thursday, October 5th *(optional)*

7:30 AM – 8:30 AM

Continental Breakfast at LRS

8:30 AM – 9:30 AM

PensionGold Product Lab *(Session 15a)*

Staffed by Jaime Miers, Phil Sporcich, and Leah Hardy

Are you curious about enhancements to the PensionGold products? Are you wanting to become more familiar with Template Editor or Ad Hoc Reporting tools? Do you have questions about Outlook Connector or Message Center? Are there other features within the PensionGold suite of products you would like to work with? This is your chance to get hands-on experience. We will have members of our Retirement Solutions team on hand and available to assist you and answer your questions. If there are specific scenarios you would like to observe, chat with your favorite Retirement Solutions staff member prior to the Product Lab so they will be able to tailor the session to your needs.

Ad Hoc Reporting Roundtable – Version 3 & 4 *(Session 21)*

Presented by Peter Chenoweth and Nolan Groenewold
Join our DBA and Product Support team members for a roundtable discussion about all things ad hoc reporting within PensionGold Version 3 and Version 4. Curious about best practices? Not sure where to begin? Have technical questions about the solutions? This is the session for you. We will present a brief overview and demo of our ad hoc solutions, but most of the time will be spent in open discussion.

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

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8:30 AM – 8:50 AM

Campus Tour *(Session 13c)*

Take 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 2022 conference.)*

9:45 AM – 10:45 AM

PensionGold Product Lab *(Session 15b)*

Staffed by Shannon Rennecker and Trevor Donahue
See description shown for 8:30 AM session.

PensionGold Version 4 Demo *(Session 6b)*

Join the Product Development team for a demonstration of PensionGold Version 4.

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

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