



***“Honoring our past ...
Preparing for your future”***

September 17-19, 2019

Levi, Ray & Shoup, Inc.
Corporate Headquarters



2401 W. Monroe Street
Springfield, Illinois

—Draft—

Agenda

As of July 31, 2019

LRS Retirement Solutions
PensionGold Teaming Conference
September 17-19, 2019
Agenda

Tuesday, September 17th

7:30 AM – 8:30 AM

Registration Check-In and Breakfast at LRS

8:30 AM – 10:10 AM

Welcome and Introductions (Session 1)

Welcome to the 23rd 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, highlighting our guest speaker, 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.

10:30 AM – 11:30 AM

Product Update – Version 3 (Session 18)

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

Product Update - Version 2 (Session 13)

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 Update - Version 1 (Session 10)

In this session, our Product Support team will provide an overview of the recent development activities focused on technology changes that we continue to test in an effort to ensure that PensionGold Version 1 can continue to be supported as technology changes.

11:30 AM – 12:45 PM

Lunch

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

12:15 PM – 12:35 PM

Campus Tour (Session 9a)

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.

12:45 PM – 2:00 PM

"A Day in the Life - It's not just PensionGold" (Panel Discussion) (Session 2)

We realize using PensionGold to perform benefit calculations and process payroll is just part of what you do. This panel discussion will explore member communications/outreach as well as how customers measure the effectiveness of their various member communications strategies and specific processes. Topics range from maintaining consistent broadcast messages, use of social media and member portal, and programs and events, to response time for member questions and timeliness processing of a retirement benefit, disability, refund, etc.

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2:15 PM – 3:15 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.

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 14)

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.

PensionGold Version 1 Product Lab (Session 11)

In this session, customers who may be novices at using their PensionGold Version 1 software will have the opportunity to get "hands on" with our Version 1 software, with the assistance of our Product Support team. They will help you understand how to get the most out of the product. They will also be able to share examples of "best practices" to follow when working with the PensionGold Version 1 software. If you are new to your retirement system or are not an accomplished PensionGold Version 1 user, you will find this session beneficial.

3:30 PM – 4:30 PM

Template Editor – Version 3 (Session 20)

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 Show and Tell – Version 3 (Session 21)

Over the past few years, our Product Research and Development team has released a significant amount of new and improved PensionGold Version 3 functionality. Examples include Customer Relationship Management, Activity and Milestone Tracking, Calendar Integration for Counselors, Multi-factor Authentication, Secure Messaging via MemberDirect, and a fully redesigned version of EmployerDirect. The product's core business functionality has also been expanded to support customer needs, such as handling of complex Bank Mergers, more Trial processes, and improved employer reporting capabilities. Join us as we show and tell you how these changes can benefit your retirement system.

Web Member Services Show and Tell – Version 2 (Session 15)

Over the past couple years, our Version 2 team has developed several new Web Member Services (WMS) security enhancements and new WMS functionality. Examples include forcing users to change their password, requiring users to complete reCAPTCHA to create an account, Trusted Devices, requiring a personal identification number (PIN) to create an account, and sending a new account confirmation letter. In addition, administrative reports are now available that provide various statistics such as the number of accounts created, the number of logins, the number of failed logins, the number of password changes and password requests, and the number of benefit estimates generated. Join us as we show and tell you how these changes can enhance your WMS application and security.

PensionGold Version 1 Product Lab (continued)

Please refer to session description listed for 2:15 PM.

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6:00 PM – 9:00 PM

**Teaming Conference Dinner – Augie's Front Burner,
Springfield**

Join your fellow attendees and the LRS Retirement Solutions team for cocktails and a sit-down dinner at Augie's Front Burner, an upscale restaurant serving American fare in a colorful setting. The evening will begin with cocktails and appetizers and follow with dinner at this establishment located in historic downtown Springfield.

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).*

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Wednesday, September 18th

7:30 AM – 8:30 AM

Breakfast at LRS

8:30 AM – 9:30 AM

Customer Product Suggestions – Version 3 (Session 22)

This session has been reserved to give conference attendees an opportunity to provide feedback regarding the PensionGold Version 3 product and services. This session will provide a forum for customers to present ideas, suggestions, or requests for product features and enhancements that may not already be planned for inclusion 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 – Version 2 (Session 16)

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

Customer Product Suggestions – Version 1 (Session 12)

In this session, the Version 1 Product Support team will solicit suggestions from the customers on what features they would like to see added to the Version 1 product. Many enhancements have been made to the other product versions that might be of interest to existing Version 1 customers. Customers are encouraged to create their list of ideas and suggestions and bring it with them to the conference for discussion with the Version 1 Product Support team.

9:50 AM – 11:45 AM

Guest Speaker – Patti Wood (Session 4)

Called the “Gold Standard of Body Language Experts” by the Washington Post, Patti Wood is an international speaker, trainer, researcher, and author of nine books. She is recognized as a nonverbal communication and human behavior expert and interviewed by media outlets around the globe to render her opinion on the body language of celebrities and public figures. And this year Patti Wood will be speaking about body language and communication at the 23rd Annual PensionGold Teaming Conference.

11:45 AM – 12:45 PM

Lunch

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

12:15 PM – 12:35 PM

Campus Tour (Session 9b)

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.

12:45 PM – 3:00 PM

Roundtable Discussions (Session 5)

Attendees will have an opportunity to join several tables during this 2+ 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 Artificial Intelligence (AI), BCP/Disaster Recovery, Server (database) Upgrade Strategies, Vulnerability Scanning, Imaging/Barcoding/Scanning, SOC II and PII, and Social Media.

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3:15 PM – 4:15 PM

PensionGold Product Lab (Session 23)

Are you curious about enhancements to the PensionGold products? Are you a Version 1 or 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.

3:15 PM – 3:35 PM

Campus Tour (Session 9c)

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.

3:15 PM – 4:15 PM

1-on-1 Meetings (Session 25)

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.

6:00 PM – 9:00 PM (Shuttle departs hotel: 5:45 and 6:00)

Teaming Conference Reception – Ace Sign Company Museum, Springfield

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 Ace Sign Company Museum, a historic attraction displaying over 85 vintage signs from Springfield and Route 66. You'll be able to "Get your kicks on Route 66" – while enjoying great food and cold beverages - and can even take part in an optional tour of the sign production facility.

Casual attire is appropriate. Spouses or significant others are welcome to attend at no additional cost. *(Please be sure to note their plans to attend when you submit your registration).*

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Thursday, September 19th

7:30 AM – 8:30 AM

Breakfast at LRS

8:30 AM – 9:30 AM

PensionGold Customer Led Session (Session 6)

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.

9:45 AM – 10:45 AM

Foundations for Security (Session 8)

Within Information Technology, security threats are ever present. 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.

Microsoft Excel Tips and Tricks (Session 7)

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

ActiveReports Server (ARS) – Ad Hoc Reporting – Version 3 (Session 24)

Microsoft has chosen to depreciate the Semantic Model Definition Language (SMDL) report data models leveraged by PensionGold’s current SSRS-based Ad Hoc Reporting solution. Although customers are not immediately affected, we’ve proactively developed a new Ad Hoc Reporting solution for PensionGold Version 3 built on ActiveReports Server (ARS) technology. Join us for a demonstration and to learn more about this change in direction.

11:00 AM – 11:45 AM

Closing Session (Session 26)

We will wrap up our 23rd PensionGold Teaming Conference with a final session, before Noon on Thursday. 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.

11:45 AM – 12:30 PM

Box Lunch Available

Pre-ordered box lunches will be available. Seating will be available in the Auditorium and the Atrium area.