

The logo for the PensionGold Teaming Conference. It features the word "PENSIONGOLD" in a large, white, serif font with a registered trademark symbol (®) at the end. Below it, the words "TEAMING CONFERENCE" are written in a smaller, yellow, serif font. The text is framed by two horizontal yellow lines, with a yellow diamond shape pointing upwards above the top line and a yellow diamond shape pointing downwards below the bottom line.

PENSIONGOLD[®]

TEAMING CONFERENCE



2024

Welcome!

Thank you for attending the 2024 PensionGold® Teaming Conference. It seems every year the conference grows in number of attendees, number of customers, and the number of new topics to discuss. This year is no exception as we are setting or tying records again. The record number of attendees brings with it space and location challenges. Those of you who have joined us through the years will notice **a change in location for the second day of the conference**. Yes, we may have finally outgrown the LRS main campus and are excited to utilize Springfield's downtown convention center for Day 2 of the conference. You will find it is conveniently located and attached to the conference hotel.

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. Simply navigate to <https://builder.guidebook.com/g/2024pgtc/> on your mobile device and enter the **passphrase**, which is: **pgtc2024**. Or, locate the 2024 PensionGold Teaming Conference program booklet in PDF form at <https://www.lrsretirementsolutions.com/Teaming-Conference-login> (username = teaming; password = pgold28).

Regarding this year's schedule, we're going with what seemed to work well the last couple of years. We have again packed several sessions into 2 full days which allows us to wrap up the formal portion of the conference by 5:00 PM on Wednesday (Day 2). Thursday morning (Day 3) offers *optional* product demonstrations and small group sessions, where you will have the opportunity to gain practical experience with various PensionGold technical and business topics. Last year's attendees found these sessions highly valuable, so we recommend joining if your travel plans permit. A survey will be provided for you to indicate your preferred Day 3 topics, for those who plan to attend!

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 Erin's Pavilion in Southwind Park for the Teaming Conference Reception on Tuesday evening (Day 1), which provides networking opportunities with your peers in a casual setting. You can kick back and relax with great food and drinks of course.

Each year we select a theme for the conference and build activities around the theme. Being a Chicago Bears fan since an infant, it's been a pretty rough journey most years and especially the last few. We have a glimmer of hope for a better year this season... but we say that every year! In any case, the theme this year centers around tailgating with your favorite team (any sport), and we will have some "sports" activities to test your skills at the reception.

Thank you for choosing LRS, our PensionGold products, and for joining us at the 2024 PensionGold Teaming Conference. Together, let's "Win with PensionGold"!



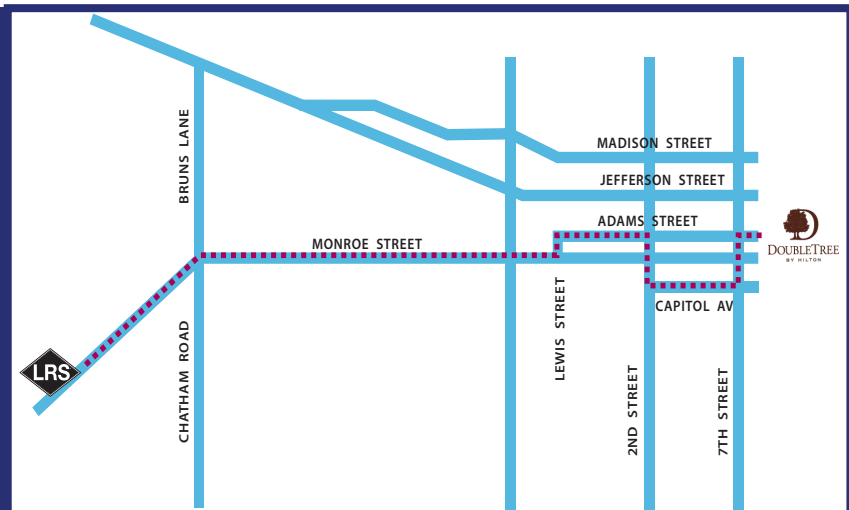
Tom Chesser

Defining tomorrow. Delivering today.

Maps & Shuttle

HOTEL TO LRS CAMPUS

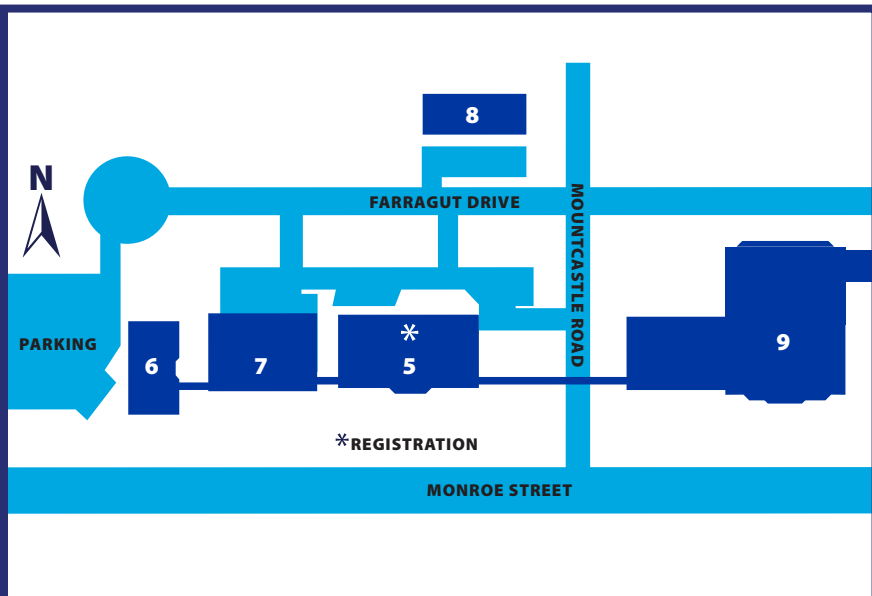
1. Go West on E. Adams toward S. 7th
2. Turn left at S. 7th St.
3. Turn right at E. Capitol Ave.
4. Turn right at S. 2nd St.
5. Turn left at E. Adams St.
6. Turn left at S. Lewis St.
7. Turn right at W. Monroe St.
8. LRS on right at 2401 W. Monroe St.
9. Park near Bldg. 6, and follow the sidewalk to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



Maps & Shuttle

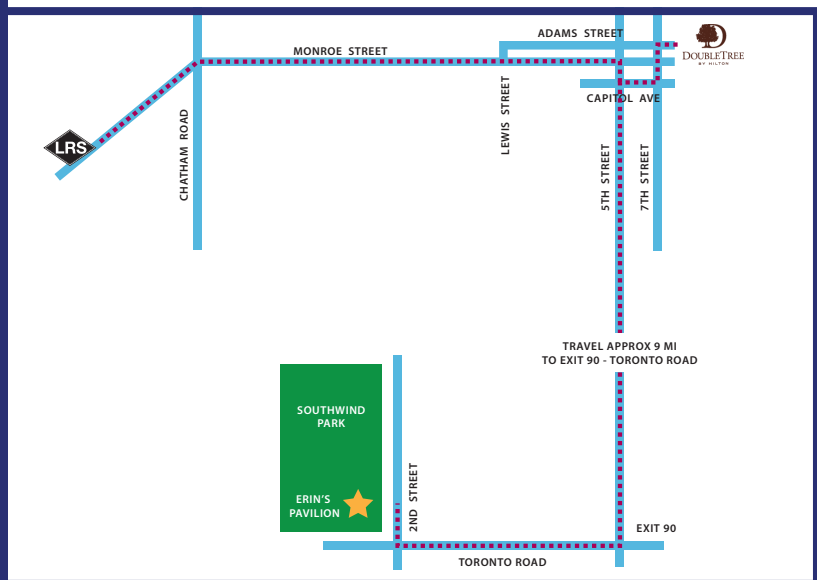
SHUTTLE SCHEDULE

TUESDAY 10/8: 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 10/10 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 ERIN'S PAVILION AT SOUTHWIND PARK

1. From either LRS or DoubleTree - President Abraham Lincoln Hotel, proceed SOUTH on 5th Street.
2. Follow 5th Street SOUTH, approx 9 miles to Exit 90 Toronto Road
3. Turn RIGHT at end of exit ramp
4. Follow Toronto Road WEST to S. 2nd Street.
5. Turn RIGHT onto S. 2nd Street
6. Follow to entrance of Southwind Park / Erin's Pavilion



CONTACTS

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John Katalinich (Shuttle)
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217-862-9304

Lincoln Yellow Cab
217-523-4545

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

Frequently Asked Questions

Where are the conference sessions held?

Day 1 (Oct. 8) and Day 3 (Oct. 10) sessions take place at the LRS campus in Springfield, at 2401 W. Monroe Street. All Day 2 (Oct. 9) sessions will be held in the lower level of the Bank of Springfield (BOS) Center next door to the conference hotel. You can access the BOS Center from inside the conference hotel; ask for guidance at the front desk. If you are driving to the BOS Center from a different hotel, navigate to: 1 Convention Center Plaza, Springfield, IL 62701. Street parking is free; Plaza Parking Garage is also available for \$7/day (entrances on 7th Street and on Washington Street).

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 below, or navigate to <https://builder.guidebook.com/g/2024pgtc/> on your mobile device and use the passphrase “pgtc2024”.



Is there a shuttle between the conference hotel and LRS?

Yes! For those of you who need a way to get to the LRS campus from the conference hotel on Day 1 and Day 3, we provide a shuttle van that will run between LRS and the DoubleTree - President Abraham Lincoln Hotel. There are scheduled pickups and drop-offs for Days 1 and 3 (see Pg. 5). You can locate the shuttle outside the main entrance at the conference hotel and outside Building 5 on the LRS campus. Jump on the shuttle if you need a ride; seats are available on a first come, first served basis.

Is there a shuttle between the Springfield airport and the conference hotel?

Yes! If you need a ride from the Abraham Lincoln Capital Airport to the conference hotel, please call the hotel at 217-544-8800 as soon as you arrive at the airport and request a shuttle pickup. If you are arriving on Monday, another option is to contact John Katalinich at 217-836-2767 to get a ride via the LRS shuttle van. (Both of these options are also available for getting back to the airport later in the week.)

Is there a dress code?

The short answer is “no”, but we can offer some general guidance. For the daytime sessions on Day 1 and Day 2, most attendees typically wear business casual attire. You might consider bringing along a light jacket or sweater, as room temperatures vary. The evening reception on Day 1 will be more relaxed with a casual dress code, and we encourage you to show your team spirit by wearing your favorite sports team apparel to go along with our “tailgating” theme. (Note: Day 3 is a travel day for many attendees; casual clothing is fine.)

Where is the Internet Café?

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

Frequently Asked Questions

Where can I park my vehicle?

If you drive to the LRS campus versus taking our shuttle from the conference 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).

If you don't stay at the conference hotel and you drive to the BOS Center for the Day 2 sessions, you may park on the street (which is free) or in the Plaza Parking Garage for \$7/day (entrances on 7th Street and on Washington Street).

Which sessions can I attend?

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 on Day 1 and Day 3 at the LRS Campus, in the Building 5 Atrium. Throughout the day you'll find snacks and beverages at locations near the sessions. Lunch on Day 1 will also be served in the Building 5 Atrium. Day 2 breakfast is available at Lindsay's Restaurant at the conference hotel; look for a breakfast voucher in your Welcome Bag. Day 2 lunch will be served on the lower level of the BOS Center. (Note: Day 1 dinner is available at the Teaming Conference Reception at Erin's Pavilion.)

Where can I charge my phone at LRS?

Bring your charging cable to the conference and plug into the USB connection available at EVERY seat in our main classroom in LRS Building 9 (where the Welcome Session is held). If you forget your cable or need other charging options, check out the Internet Café in the LRS Building 5 Atrium.

Can I store my luggage at LRS?

If you're flying out on Thursday and need a place to store your luggage for a few hours, we have a storage closet available at LRS for that purpose.

What is the Team Challenge?

During the 2024 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: Win 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!

LRS Retirement Solutions
PensionGold Teaming Conference
October 8-10, 2024
Agenda

Day 1 – Tuesday, October 8th – at LRS

7:30 AM – 8:30 AM

Registration Check-In and Breakfast at LRS

8:30 AM – 9:50 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 and will have an opportunity to get acquainted with their fellow conference participants.

10:05 AM – 11:05 AM

Product Update – Version 3 & 4 (Session 2)

Presented by Justin Long and Laura Soehlin

Join the Product Development team for a review of recent and planned development activities with PensionGold Version 3 and 4.

Product Update and Customer Suggestions - Version 2 (Session 3)

Presented by Bob Blythe, Mark Luebke, Jaime Miers, Christina Percy, and Shannon Rennecker

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)

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. *The first day of the conference (Day 1) and the optional day (Day 3) have timeslots allocated for these meetings.*

11:15 AM – 12:05 PM

PensionGold Security Panel Discussion (Session 4)

Presented by Peter Chenoweth, Mike Chestnut, and Phil Sporch

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.

Retirement Solutions 101 (Session 9)

Presented by Jeff Proffitt and Matt Muller

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.

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.

**LRS Retirement Solutions
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12:05 PM – 1:15 PM

Lunch

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

12:45 PM

Campus Mini-Tour (Session 24)

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.

1:15 PM – 2:30 PM

"Great Service – Less Paper" Panel Discussion (Session 5)

Moderated by John Katalinich. Customer panelists include: Amy McInerney of SBCERA, Breanna Newsome of GRS, and Missie O'Neal of ERFC.

Reducing the use of paper within the retirement office is a reality for many organizations. Cost effective and readily available technology for areas such as electronic correspondence, forms management, and front-end scanning can virtually eliminate the use of paper when completing member administration processes. What strategies are being used to reduce or eliminate the use of paper while maintaining a high level of customer service? Three customer panelists will share information from their organizations, and our moderator, John Katalinich, will be encouraging input and discussion from the audience.

2:40 PM – 3:30 PM

Customer Product Suggestions Roundtable – All Versions (Session 6)

Moderated by Dan McCain, Laura Soehlin, Trevor Donahue, and Bob Blythe

Here's your chance to take the mic and share your ideas for future PensionGold product features and enhancements. This session is open to customers running any version of PensionGold.

3:45 PM – 4:45 PM

PensionGold Version 4 Demo (Session 7)

Presented by Laura Soehlin

Whether you are currently implementing Version 4, thinking about an upgrade, or just curious what it looks like, join the Product Development team for a look at the latest version of PensionGold. Submit your suggestions early if there is something specific you would like to see demonstrated.

Correspondence and Electronic Document Management / Imaging Roundtable (Session 13)

Moderated by Aaron Bessie and Phil Sporcich

LRS Retirement Solutions will facilitate this session encouraging open discussion on using electronic document imaging systems. Share, listen, and interact with other funds to learn about best practices with EDM systems along with ideas for extending PageCenterX® (PCX) beyond member documents. Submit your questions early for this interactive session.

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.

6:00 PM – 9:00 PM

Teaming Conference Reception – Erin's Pavilion at Southwind Park, Springfield, IL (Shuttle departs hotel: 5:45 and 6:00)

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 Erin's Pavilion. Join us for food, drinks, and fun!

Casual attire is appropriate; in fact, you're invited to proudly wear your favorite sports team apparel at our "tailgate" reception. Spouses or significant others are welcome to attend.

LRS Retirement Solutions
PensionGold Teaming Conference
October 8-10, 2024
Agenda

Day 2 – Wednesday, October 9th – at BOS Center, downtown Springfield

Prior to 8:30 AM

Breakfast at conference hotel – Lindsay's Restaurant

8:30 AM – 10:40 AM

Discussion Tables (Session 11)

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 LRS Retirement Solutions team. A tentative list of topics includes: Training New Staff, Contact & Activity Tracking with Members (i.e., surveys, voting, etc.), Kat & Tom's Table, Surviving an Audit, 1099 Processing, SMS Text for more than just 2FA, and Member Identification (beyond SSN).

10:50 AM – 11:50 AM

Artificial Intelligence (AI) – How could pension funds benefit? (Session 12)

Presented by Eric Johnson and Justin Long

Join the Product Development team as we discuss AI and actively seek input from customers on potential use cases for AI.

Online Retirement and Refunds (Session 14)

Presented by Alicia Rawlings and Chris Collins

The LRS Retirement Solutions Product Support team will demonstrate and discuss a few customer solutions enabling members to retire from the comfort of their homes, even in their pajamas. Electronic Signature alternatives will be part of this discussion.

Microsoft Excel Pivot Tables (Session 6)

Presented by Penny Morgan (of LRS EOM Training) and Shannon Rennecker

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

The New Google Analytics (GA4) (Session 10)

Presented by Andy Krug (of LRS Marketing) and Phil Sporcich

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 (MemberDirect or WMS).

11:50 AM – 1:00 PM

Lunch

A buffet lunch will be served at the BOS Center.

1:00 PM – 1:30 PM

Mini Session 6: MemberDirect – Now What? (Session 15a)

Presented by Jeff DeKoker and Andy DeGroot

Members of our Product Development and Implementations teams will share current and custom security strategies for enrollment and logging in to MemberDirect, providing funds some peace of mind when allowing members to update information such as tax withholding, mailing addresses, and direct deposit account information. Lexis/Nexis and additional enhancements will be discussed.

Mini Session 4: How did that happen? Using the PGV2 Audit Trail (Session 16)

Presented by Bob Blythe

There is a vast amount of information in the Version 2 Business Audit Trail that can answer questions related to who made a change, what did they change, and when did it happen. This session will help you learn how to efficiently navigate through the Business Audit Trail, understand what information is available and how you can find the information that's relevant to your needs.

LRS Retirement Solutions PensionGold Teaming Conference October 8-10, 2024 Agenda

1:00 PM – 1:30 PM

Mini Session 3: How did that happen? Using the PGV3-V4 Audit Trail (Session 17a)

Presented by Nolan Groenewold

There is a vast amount of information in the Version 3 Business Audit Trail that can answer questions related to who made a change, what did they change, and when did it happen. This session will help you learn how to efficiently navigate through the Business Audit Trail, understand what information is available and how you can find the information that's relevant to your needs.

Mini Session 2: What is a SOC Audit? Can LRS assist you with your Security Audit? (Session 18)

Presented by Peter Chenoweth and Mike Chestnut

A Systems and Organizations Controls Report (SOC 2) for LRS provides detailed information and assurance about our security, availability, and confidentiality controls. Learn from our Security Officer more about this report and how we assist customers with their security audits.

1:40 PM – 2:50 PM

PensionGold Customer Led Session (Session 19)

Moderated by Julie West of MPERS

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.

3:00 PM – 3:30 PM

Mini Session 6: MemberDirect – Now What? (Session 15b)

Presented by Jeff DeKoker and Andy DeGroot

Members of our Product Development and Implementations teams will share current security strategies for enrollment and logging in to MemberDirect, providing funds some peace of mind when allowing members to update information such as tax withholding, mailing addresses, and direct deposit account information. Lexis/Nexis enhancements will be discussed.

Mini Session 5: Modern Authentication for PensionGold Version 4 (Session 20)

Presented by Eric Johnson and Justin Long

PensionGold Version 4 now supports modern authentication methods, such as Microsoft Entra ID. Learn from the Product Development team what this is all about and how your organization might benefit.

Mini Session 3: How did that happen? Using the PGV3-V4 Audit Trail (Session 17b)

Presented by Nolan Groenewold

There is a vast amount of information in the Version 3 Business Audit Trail that can answer questions related to who made a change, what did they change, and when did it happen. This session will help you learn how to efficiently navigate through the Business Audit Trail, understand what information is available and how you can find the information that's relevant to your needs.

Mini Session 1: LRS IT Solutions and Cybersecurity (Session 21)

Presented by Chris Hill of LRS IT Solutions

Join our LRS IT Solutions team for an introduction to our professional services and cutting-edge solutions. Addressing security concerns can be daunting, but this session will showcase our dedicated team of security experts who can help you develop a robust risk management strategy. We collaborate with various retirement and pension fund organizations, assisting them in identifying and addressing security issues throughout their operations.

3:45 PM – 4:30 PM

Closing Session (Session 22)

We will wrap up the formal portion of our PensionGold Teaming Conference with a final session, late on Wednesday afternoon (Day 2). 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. (See Day 3 sessions on the next page.)

LRS Retirement Solutions
PensionGold Teaming Conference
October 8-10, 2024
Agenda

Day 3 – Thursday, October 10th (optional) – at LRS

7:30 AM – 8:30 AM

Continental Breakfast at LRS

8:30 AM – 9:30 AM

Campus Tour (Session 26a)

Take a 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.

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. *The first day of the conference (Day 1) and the optional day (Day 3) have timeslots allocated for these meetings.*

9:45 AM – 10:45 AM

Campus Tour (Session 26b)

Take a 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.

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.

8:30 AM – 10:45 AM

Small Group Sessions (Sessions 25a-25k)

Dependent upon customer input and interest, most or all of the following sessions will be scheduled for Thursday morning at either 8:30 or 9:45. **Times and room assignments will be available on Wednesday afternoon.**

If you're interested in diving deeper into any of these topics or prefer to work closely with our LRS Retirement Solutions team to address your specific questions, these focused small group sessions provide the perfect opportunity to gain practical experience.

Technical Track

- 25a: Email delivery confirmation with SendGrid, *with Aaron Bessie*
- 25b: Vulnerability/Intrusion Scanning, *with Mike Chestnut*
- 25c: Benefits of a Hosted Environment, *with Mike Chestnut and Paul Tarr*
- 25d: EmployerDirect First Look (v4), *with Jeff DeKoker and Tamara Goulet*. EmployerDirect has been re-developed from the ground up for Version 4. Join us for a first look at our new self-service portal for employers.
- 25e: Encrypted Secure File Transfer (ACH, Transmittal, etc.), *with Chris Ose, Karlee Kuntzman, and others.*

Business Track

- 25f: Online Retirement Processing, *with Product Support Staff*
- 25g: Explore PensionGold Features, *with Product Support Staff*
- 25h: AgilePoint Workflow, *with Troy Higginbotham and Kerry Burns*
- 25i: SSRS, Wyn, or DataDirect Reporting, *with Peter Chenoweth, Tristan Ropac, and Product Support Staff*
- 25j: Customer Portal, *with Lane Fowler*
- 25k: Template Editor, *with Kerry Burns and Product Support Staff*

*Prior to and on the first day of the conference, you'll have the chance to **sign up for the Day 3 topics** that pique your interest. Watch for a survey to come your way via email!*

2024 PensionGold Teaming Conference Schedule

Room	Rm Size	DAY 1 - Tuesday, October 8, 2024 - at LRS							6:00 - 9:00
		8:30 - 9:50	10:05 - 11:05	11:15 - 12:05	12:05 - 1:15	1:15 - 2:30	2:40 - 3:30	3:45-4:45	
Building 9 - Classroom 307	84	#1 Welcome Session (Teams "Meet & Greet" portion starts at 9:30)	#2 V3-4 Product Update	#4 PensionGold Security Panel Discussion		#5 Great Service - Less Paper (Panel Discussion)	#6 Product Suggestions Roundtable	#7 PensionGold Version 4 Demo	Teaming Conference Reception Erin's Pavilion, Southwind Park
Building 9 - Conf Rm 312	10+								
Building 9 - Conf Rm 303	5	Meet & Greet 9:30-10:00							
Building 9 - Conf Rm 304	5	Meet & Greet 9:30-10:00							
Building 9 - Conf Rm 305	7	Meet & Greet 9:30-10:00							
Building 9 - Conf Rm 477	14+								
Building 5 - Atrium	n/a				Lunch				
Building 5 - Auditorium	48		#3 V2 Product Update	#9 Retirement Solutions 101				#13 Correspondences & EDM/Imaging Roundtable	
Building 5 - Conf Rm 263 (2nd floor)	10+								
Building 7 - Training Rm 428	10+								
Building 7 - Conf Rm 429	10+								
Various Conference Rooms	n/a		#23 1-On-1 Meetings	#23 1-On-1 Meetings				#23 1-On-1 Meetings	
Building 5 entryway - at "Registration Table"	n/a				(at 12:45) #24 Campus Mini-Tour				
BOS Ctr. - B11 C & D	110+								
BOS Ctr. - B10	57								
BOS Ctr. - B9	54								
BOS Ctr. - B7W	48								
BOS Ctr. - B7E	27								
BOS Ctr. - B6E	18								
BOS Ctr.- B11 B (LUNCH)	100+								

KEY:	Meals
	Version 2 & Adv
	Version 3-4
	General Sessions

9/27/2024

2024 PensionGold Teaming Conference Schedule

Room	Rm Size	Day 2 - Wednesday, October 9, 2024 - at Bank of Springfield (BOS) Center								Day 3 - Thursday, October 10, 2024 - at LRS	
		8:30 - 10:40	10:50 - 11:50	11:50 - 1:00	1:00 - 1:30	1:40 - 2:50	3:00 - 3:30	3:45 - 4:30	Free evening	8:30 - 9:30	9:45 - 10:45
Building 9 - Classroom 307	84								No Evening Event Planned	#25	#25
Building 9 - Conf Rm 312	10+									#25	#25
Building 9 - Conf Rm 303	5									#25	#25
Building 9 - Conf Rm 304	5										
Building 9 - Conf Rm 305	7										#25
Building 9 - Conf Rm 477	14+									#25	#25
Building 5 - Atrium	n/a										
Building 5 - Auditorium	48									#25	#25
Building 5 - Conf Rm 263 (2nd floor)	10+									#25	#25
Building 7 - Training Rm 428	10+									#25	#25
Building 7 - Conf Rm 429	10+									#25	#25
Various Conference Rooms	n/a									#23 1-On-1 Meetings	#23 1-On-1 Meetings
Building 5 entryway - at "Registration Table"	n/a									#26a Campus Tour	#26b Campus Tour
BOS Ctr. - B11 C & D	100	#11 Discussion Tables				#19 Customer Led Session		#22 Closing Session			
BOS Ctr. - B10	57		#12 Artificial Intelligence (AI)		#15a Mini Session: MemberDirect - Now What?		#15b Mini Session: MemberDirect - Now What?				
BOS Ctr. - B9	54		#8 MS Excel Pivot Tables		#16 Mini Session: Using the PGV2 Audit Trail		#20 Mini Session: Modern Authentication (PGV4)				
BOS Ctr. - B7W	48		#14 Online Retirement and Refunds		#17a Mini Session: Using the PGV3-V4 Audit Trail		#17b Mini Session: Using the PGV3-V4 Audit Trail				
BOS Ctr. - B7E	27		#10 Google Analytics (GA4)		#18 Mini Session: SOC2 and Security Audits		#21 Mini Session: LRS IT Solutions - Cybersecurity				
BOS Ctr. - B6E	18				LRS Staff Use		LRS Staff Use				
BOS Ctr.- B11 B (LUNCH)	100+			Lunch							

9/27/2024

KEY:	Meals
	Version 2 & Adv
	Version 3-4
	General Sessions

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