

**UW System Tax-Sheltered Annuity (TSA) 403(b) Program
TSA Review Committee (TSARC)
Recordkeeping Review Subcommittee Meeting**

**Thursday, October 24, 2019 – 10:00 am to 12:00 pm
780 Regent St. Room 126 A&B
Madison, WI**

- 10:00 am 1. Call to Order
- 10:05 am 2. Recordkeeping Review+ – Cynthia Zaleta, Teresa Kruse, Aon Hewitt
- a) Confirm preferred recordkeeping model
 - b) Review priority listing for recordkeeping models
 - c) Examine vendors' ability to meet priorities
 - d) Confirm vendors' service model for consolidated services
 - e) Discuss Next Steps
- 11:55 am 3. Adjourn

No action is anticipated, but the Committee reserves the right to take action on any of the topics listed for discussion, as necessary.

+Attachment(s)

Times shown are estimates only. Unless otherwise noted, the presenters are TSA Program staff.

This meeting is handicap assessable.

To attend or for information, contact Rose Stephenson, rstephenson@uwsa.edu, 608-262-5564