

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

**Friday, December 13, 2019 – 9:30 am to 12:00 pm
780 Regent St. Room 123
Madison, WI**

- 9:30 am 1. Call to Order
- 9:35 am 2. UW TSA 403(b) Program Investments+ – Dan Pawlisch, Leon Kung, Aon
- Review Current State
 - Objective Setting
 - Investment Structure Considerations, Including the Number and Types of Investment Options
 - Self-Directed Brokerage Window Review
 - Qualified Default Investment Alternative Review
 - Investment Mapping and Re-Enrollment
- 11:55 pm 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.

The meeting location is handicap accessible.

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