

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

**Monday, July 29, 2019 – 1:30 pm to 5:30 pm
780 Regent St. Room 126 A&B
Madison, WI**

UW System Administration: Dan Chanen, Director of Benefits; Erin Schoonmaker, Benefits Program Manager; Rose Stephenson, UW TSA Plan Administrator; Brianna Greenwood, Benefits Specialist; Jennifer Lattis, Deputy General Counsel

TSARC Recordkeeping Review Subcommittee: J. Michael Collins, (Chair), Ann Iverson, David J. Miller

Aon Hewitt Investment Consulting: Recordkeeping Review: Cynthia Zaleta, Teresa Kruse

- 1:30 pm 1. Welcome and Introductions
- 1:35 pm 2. Recordkeeping Review Discussion; Administrative Fee Considerations; Administrative Structure Review; Service Requirements+ – Aon, Cynthia Zaleta, Teresa Kruse
- 5:15 pm 3. Next Steps; Assignments
- 5:30 pm 4. Adjourn

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

Going Green: printed meeting materials will not be provided. WiFi – UWNet; logon as an [affiliate](#) or as a [guest](#).

+Attachment(s)

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

The meeting location is handicap accessible.

For information, contact Rose Stephenson, rstephenson@uwsa.edu, 608-262-5564