

UW System Tax-Sheltered Annuity 403(b) Program TSA Review Committee Meeting

Monday, July 29, 2019 – 10:00 am to 1:00 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: J. Michael Collins, (Chair), Anoop Dhingra, Ann Iverson, Rashiqa Kamal (Vice Chair), William Maas, David J. Miller, Syed M. Moiz, David Schalow, Kimberly Sipiorski

Aon Hewitt Investment Consulting: Investment Review: Dan Pawlisch, Leon Kung
Recordkeeping Review: Cynthia Zaleta, Teresa Kruse

- 10:00 am 1. Welcome and Introductions
- 10:10 am 2. Investment Structure Discussion; Asset Class Overview; Draft Investment Policy Statement; Progress Report+ – Aon, Dan Pawlisch
- 12:50 pm 3. Next Steps; Assignments
- 1:00 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