

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

Wednesday, September 4, 2019 – 11:00 am to 12:00 pm

Teleconference

780 Regent St. Room 213

Madison, WI

- 11:00 am 1. Call to Order
- 11:05 am 2. Recordkeeping Review+ – Aon, Cynthia Zaleta, Teresa Kruse
- a) Finalize Must Have / Priority Services
 - b) Review Minimum Criteria; Narrow to 10 or less for Administration Review Phase
 - c) Decide on 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 will be held via Teleconference, but it is open to the public.

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