



UW System Tax-Sheltered Annuity Review Committee

Friday, April 30, 2021 – 9:30 am to 11:00 pm

Via WebEx Conference

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| 9:30 am | 1. Welcome and Introductions |
| | 2. Review and Approval of October 16, 2020 and February 26, 2021 TSARC Meeting Minutes +* |
| 9:40 am | 3. Update on Implementation of New Structure |
| 9:50 am | 4. Investment Review+ – Dan Pawlisch, Leon Kung, Aon Investments USA Inc. |
| 10:05 am | 5. TSARC Communication Subcommittee Report: Communication Plan+ – TSARC Communication Subcommittee and Lindsay Stortz, Willis Towers Watson |
| 10:15 am | 6. TSARC Communication Subcommittee Composition; UW 403(b) SRP Tagline* |
| 10:20 am | 7. TSA 403(b) Program Updates |
| | a. Plan Administration and Operational Updates+ |
| | b. Financial Report+ |
| 10:30 pm | 8. UW TSA 403(b) Plan Annual Report+ – Highlights |
| 10:50 pm | 9. Other |
| | 10. Next Meeting: Potential Dates Friday, September 25 or October 2? Have your calendars handy |
| 11:00 pm | 11. Adjourn* |

+Attachment(s) *Action item

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

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