



Investing  
in Your  
Financial  
Future

## UW 403(b) Supplemental Retirement Program Advisory Committee

Friday, April 29, 2022 – 10:00 am to 1:00 pm

780 Regent St. Room 126 A&B

- |          |   |
|----------|---|
| 10:00 am | 1. Welcome and Introductions  |
|          | 2. Review and Approval of October 1, 2021, November 05, 2021, and December 03, 2021 TSARC/SRPAC Meeting Minutes +*  |
| 10:15 am | 3. Investment Review and Legislative Update+ – Dan Pawlisch, Leon Kung, Aon Investments USA Inc.  |
| 10:40 am | 4. Report on UW 403(b) SRP Transition <ul style="list-style-type: none"><li>a. The Recordkeeper’s Perspective, Catina Strong, TIAA, David Bruce, Fidelity</li><li>b. The Plan Sponsor’s Perspective</li></ul>                               |
| 11:10 am | 5. UW 403(b) Supplemental Retirement Program Updates <ul style="list-style-type: none"><li>a. Implementation of In-plan Roth Rollover Option</li><li>b. Plan Administration and Operational Updates+</li><li>c. Financial Report+</li></ul> |
| 11:30 pm | Lunch   |
| 12:30 pm | 6. 2021 UW 403(b) SRP Annual Report+ – Highlights   |
| 12:55 pm | 7. Other  |
|          | .8. Next Meeting Potential Dates: Friday, October 28, November 4, or? Have your calendars handy   |
| 1:00 pm  | 9. Adjourn*   |

+Attachment(s) \*Action item

Times shown are estimates only. Unless otherwise noted, the presenters are UW 403(b) SRP staff.

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