



Investing  
in Your  
Financial  
Future

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

Friday, April 28, 2023 – 10:00 am to 1:00 pm

Van Hise Hall. Room 1820

Zoom

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| 10:00 am | 1. Welcome and Introductions  |
|          | 2. Review and Approval of November 4, 2022 SRPAC Meeting Minutes +*   |
| 10:15 am | 3. Report of the SRPAC Investment Subcommittee – Michael Collins, SRPAC; Dan Pawlisch, Aon Investments USA Inc.   |
| 10:20 am | 4. 1Q23 Capital Markets and Performance Review+ – Dan Pawlisch, Aon Investments USA Inc.  |
| 10:50 am | 5. UW 403(b) Supplemental Retirement Program Updates <ul style="list-style-type: none"><li>a. Plan Administration and Operational Updates+</li><li>b. Financial Report+</li><li>c. Implementation Update of Mandatory SECURE 2.0 Provisions</li></ul> |
| 11:10 am | 6. Provider Summary of Plan Activity+: <ul style="list-style-type: none"><li>a. TIAA – Catina Hampton</li><li>b. Fidelity – David Bruce</li></ul>   |
| 11:30 am | Lunch – 1920 Van Hise Hall  |
| 12:30 pm | 7. 2022 UW 403(b) SRP Annual Report+ – Highlights   |
| 12:55 pm | 8. Next Meeting Potential Dates: Friday, October 20 or 27, November 3, 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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