



Investing
in Your
Financial
Future

UW 403(b) Supplemental Retirement Program Investment Subcommittee

Wednesday, September 25, 2024 – 11:00 am to 12:00 pm
Via Zoom

- | | | |
|----------|---|---|
| 11:00 am | 1. Welcome | |
| 11:05 am | 2. Investment Policy Statement Review +* – | J. Michael Collins |
| 11:25 am | 3. 2Q24 Capital Markets and Performance Review + – | Dan Pawlisch, Aon Investments USA Inc.
Leon Kung, Aon Investments USA Inc. |
| 11:40 am | 4. Self-Directed Brokerage Window Review + – | Dan Pawlisch, Aon Investments USA Inc.
Leon Kung, Aon Investments USA Inc. |
| 11:45 am | 5. SECURE 2.0 increased catch-up amounts –
for participants ages 60-63 | Rose Stephenson |
| 11:50 am | 6. Dodge & Cox Proxy Vote – | Dan Pawlisch, Aon Investments USA Inc.
Leon Kung, Aon Investments USA Inc. |
| 12:00 pm | 7. Adjourn* | |

Next meetings: SRP Advisory Committee Meeting: November 1, 2024
Investment Subcommittee Meeting: First Quarter 2025

+Attachment(s) *Action item

Times shown are estimates only.

For information, contact Rose Stephenson, rstephenson@uwsa.edu, 608-262-5564