

UW 403(b) Supplemental Retirement Program Advisory Committee

Friday, May 2, 2025 – 10:00 am to 1:30 pm
780 Regent St Room 126 A&B and Zoom
Madison WI

- 10:00 am 1. Welcome and Introductions
2. Review and Approval of November 1, 2024 SRPAC Meeting Minutes +*
- 10:10 am 3. Report of the SRPAC Investment Subcommittee – Michael Collins, SRPAC
- a. Report on Action Taken during the February 17, 2025, Investment Subcommittee Meeting:
Vanguard Total Stock Market Index Eligible for Lower Cost Share Class+*
- b. Share Class Change Timeline
- 10:20 am 4. 1Q25 Capital Markets and Performance Review+ – Dan Pawlisch, Aon Investments USA Inc.
Aaron Wiemann, Aon Investments USA Inc.
- 10:50 am 5. SECURE 2.0 Section 109 – 60-63 Catch-Up Provision – Revised Effective Date, March 1 +*
- 11:05 am 6. Report of the SRPAC Communication Subcommittee – Shawna Kuether, SRPAC
- 11:10 am 7. Fee Review+
- 11:25 am 8. UW 403(b) Supplemental Retirement Program Updates
- a. Plan Administration and Operational Updates+
- b. Transition to Workday – Tina Howell, Benefits Design Team Lead
Administrative Transformation Program
- c. Financial Report+
- d. Staffing Update – Charles Saunders, CIO, Office of Trust Funds
- 11:45 am Lunch
- 12:30 pm 9. Provider Summary of Plan Activity+:
- a. Fidelity – David Bruce
- b. TIAA – Julie Buresh
- 12:50 pm 10. 2024 UW 403(b) SRP Annual Report+ – Highlights
- 1:20 pm 11. Resolution of Commendation+*
- 1:25 pm 12. Next Meeting Potential Dates: Friday, October 24, 31 or November 7, or ?
Have your calendars handy.
- 1:30 pm 13. 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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