



UW System Tax-Sheltered Annuity Review Committee

Friday, April 28, 2017 – 10 a.m. to 2:00 p.m.

UWSA 780 Regent St. Madison

Room 126 A&B

- 10:00 am 1. Welcome and Introductions
2. Review and Approval of Minutes from October 28, 2016* +
- 10:15 am 3. Roadmap for the UW TSA 403(b) Plan
- a. *Analysis and Report on the University of Wisconsin TSA 403(b) Program* + – Mark Olsen, Managing Director, PlanPilot
- b. Roadmap: Using Consultants for Plan Review and Strategic Improvements – Discussion *
- 11:45 am Lunch
- 12:45 pm 4. Plan Revenue Update; Returning Revenue to Participants +*
- 1:10 pm 5. UW TSA 403(b) Plan Annual Report+
- 1:30 pm 6. Report on TSA Plan Administration
- 1:45 pm 7. TSA Investment Company Updates, TSA Company Representatives
- a. Fidelity – Student Loan Debt Resources and Financial Basics for College Students
- [College Landing Page](#)
 - [Sizzle Reel](#)
- b. Lincoln – Redesign and new content available on the LincolnFinancial.com/Retirement website
- c. TIAA – TIAA Investments wins 5th consecutive Lipper Award – Best Overall Large Fund Company; Asset Management Update
- d. Ameriprise / RiverSource – Family Wealth Study Research Report
- e. T. Rowe Price – 2017 Product Roadmap
8. Other?
9. Next Meeting: Potential Dates Friday, October 27, November 3, or ?
Have your calendars handy.
- 2:00 pm 10. Adjourn*

*Action item +Attachment(s)

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

The meeting location is handicap accessible.

For information, contact ohrwd@uwsa.edu, 608-263-4375