UW 403(b) Supplemental Retirement Program Advisory Committee

Friday, October 30, 2026 – 10:00 am to 1:30 pm

780 Regent St Room 126 A&B & Webcast

Madison WI

10:00 am	1.	Welcome and Introductions	
10:05 am	2.	Review and Approval of May 1, 2026 SRPAC Meeting Minutes+*	
10:10 am	3.	Fiduciary Responsibility Training – Noah Brisbin, Senior Counsel	
10:25 am	4.	Report of SRPAC Investment Subcommittee –	William Maas
		a. Report on the September 30, 2026 Investment Subcommittee Meeting +	
		b. Review and Approval of Updated Investment Subcommittee Charter+*	
		c. Review and Approval of Updated UW 403(b) Supplemental Retirement Program Investment Policy Statement+*	
10:45 am	5.	3Q26 Capital Markets and Performance Review+ –	Dan Pawlisch, Aon Investments USA Inc Aaron Wiemann, Aon Investments USA Inc
11:00 am	6.	Lowest Cost Share Class Analysis+* –	Dan Pawlisch, Aon Investments USA Inc
11:10 am	7.	Self-Directed Brokerage Window Review+* –	Dan Pawlisch, Aon Investments USA Inc
11:20 pm	8.	Target Date Fund Competitive Review+* –	Dan Pawlisch, Aon Investments USA Inc
11:30 pm	9.	Recordkeeper Renewal 1/1/2027*	
11:45 am	10.	UW 403(b) Supplemental Retirement Program Updates – Chance Runde, Administrator	
		a. Plan Administration and Operational Updates+	
		b. Financial Report+	
12:00 pm		Lunch	
12:45 pm	11.	Discussion on SRPAC Term Limits	J. Michael Collins, SRPAC
1:00 pm	12.	Executive Summary of Plan Activity	
		a. TIAA – Julie Buresh+	
		b. Fidelity – David Bruce, Kevin Campbell+	
1:25 pm	13.	Next Meeting: Potential Dates April 16, 23, 30 or May 7, 2027 or ?	
1:30 pm	14.	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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