



Investing  
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Financial  
Future

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

Friday, October 1, 2021 – 10:00 am to 11:30 am

Via WebEx Conference

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| 10:00 am | 1. Welcome and introductions  |
| 10:05 am | 2. Review and approval of April 30, 2021 TSARC Meeting Minutes +*   |
| 10:10 am | 3. Fiduciary Responsibility Training – Jennifer Lattis, Deputy General Counsel  |
| 10:20 am | 4. Investment Review and Investment Subcommittee Update+ – Dan Pawlisch, Leon Kung, Aon Investments USA Inc   |
| 10:35 am | 5. Ameriprise and Lincoln Loans+*   |
| 10:45 am | 6. Report on transition to two recordkeepers  |
| 10:55 am | 7. Communication Subcommittee and Communications Report+ – Lindsay Stortz, Willis Towers Watson, Rose Stephenson, TIAA and Fidelity   |
| 11:10 am | 8. TSA 403(b) Program Updates <ul style="list-style-type: none"><li>a. Plan Administration and Operational Updates+</li><li>b. Financial Report+</li></ul>  |
| 11:20 am | 9. Appreciation*  |
| 11:25 am | 10. Next Meetings: Potential Dates; have your calendars handy <ul style="list-style-type: none"><li>a. Plan Document Proposal – Friday, November 5, 12, or ?, 2021</li><li>b. 2022 Spring Meeting– April 22 or 29, 2022 or?</li></ul> |
| 11:30 am | 11. Adjourn*  |

+Attachment(s) \*Action item

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

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