

# WA529 Committee Meeting

Thursday, November 7, 2024 | 2:00 - 4:00 p.m.

## Hybrid Meeting

- **Teams Link:** <https://tinyurl.com/mr26te59>
- **Physical location:** WSAC Office, 917 Lakeridge Way SW, Olympia, WA 98502
- **Watch on TVW:** <https://tvw.org/watch/?eventID=2024091065>

## AGENDA

Call to Order: Welcome & Member Introductions

- Approval of the September 11, 2024 Meeting Minutes ACTION
- Approval of the 2025 WA529 Committee Meeting Calendar ACTION
- Public Comment
- WA529 Update  
*Luke Minor, WA529*
  - Director's Report INFORMATION
  - Marketing Strategy Update INFORMATION
  - Financial Incentives ACTION
- DreamAhead Program Transition  
*Linda English, Kristin Murphy, Jeremey Thiessen, TIAA/TFI; Luke Minor, WA529*
  - Program Management Transition Update INFORMATION
  - Rebranding ACTION
  - Investment Policy Statement ACTION
  - Investment Lineup ACTION
  - Program Details Booklet ACTION
- Legislative Reports Review and Approval ACTION  
*Lynda Ridgeway, WA529*
- DreamAhead Financial Outlook INFORMATION  
*Lynda Ridgeway, WA529*
- DreamAhead Updates INFORMATION
  - Administrative: *David Bell, Vestwell*
  - Investment: *Bret Valerio, BNY Advisors*
- GET Updates INFORMATION
  - Administrative: *Diana Hurley, WA529*
  - Investment: *James Aber, WA State Investment Board*
- Adjournment

**Next Regularly Scheduled Meeting (pending approval of 2025 meeting calendar)**

**Thursday, February 13, 2025 2:00-4:00 p.m.**

**Hybrid Meeting:** Microsoft Teams | WSAC Office, Olympia, WA

Check <https://wsac.wa.gov/get> for updates on meeting format/location