
**Advisory Council on Tax-Deferred Arrangements
Meeting Agenda
Thursday December 4, 2025
9:00 -12:00**

Microsoft Teams Meeting:**Dial-In:** 207-209-4724**Conference Code:** 722 599 405#**Meeting Link:** [Meeting through MS Teams Link](#)**In person:**

Burton M Cross Office Building

4th Floor Rm 400

111 Sewall St Augusta, ME 04333

- I. Call to Order
- II. Introductions – Roll Call
 - a. Introduction: Jen Stevens CAPTRUST (Michael Pratico)
- III. Approval of Minutes (August 28,2025)
- IV. Plan Management & Investment Report – CAPTRUST (Michael Pratico)
 - a. Vendor Updates (Corebridge, Empower, Voya)
 - b. Retirement Industry & Market Updates (Michael Pratico)
 - c. 3rd Quarter 2025 Performance (Michael Pratico)

10 Minute Break
- V. Other Business
 - a. Share Cost Analysis (Michael Pratico)
 - b. Fiduciary Training Video (Michael Pratico)
 - c. PRISM Update (Roberta DuPont)
 - d. Loan & Roth Provisions (Michael Pratico)
 - e. Single Record Keeper Discussion (Michael Pratico)
 - f. Seat Vacancy Update (Michael Dunn)
 - g. Open Discussion
- VI. Adjourn

Next Meeting: February 26, 2026