



## Investment Advisory Committee Meeting

STAMFORD GOVERNMENT CENTER 888 WASHINGTON BOULEVARD P.O. BOX 10152  
STAMFORD, CONNECTICUT 06904-2152

### AGENDA

#### Regular Meeting

Wednesday April 20, 2022 11:00 AM

#### Call in:

<https://morganstanley.zoom.us/j/8342219198?pwd=U1pBOTICK2xVODZkWIgxcUU5RkJxdz09>

Meeting ID: 834 221 9198

Join by Phone US: [929-436-2866](tel:929-436-2866)

**Committee Members:** Joanne Noone, Assistant Controller; Louis Casolo, City Engineer; Vikki Cooper, Deputy Corporation Counsel; Eric Newman, Accountant; Mary Lou Rinaldi, Board of Finance; Jeff Curtis, Board of Reps

**Committee Member Vacancy:** TBD, OPM Director

**Invited Attendees:** David R. Javaheri, Managing Director, Morgan Stanley Wealth Management; Sandy Dennies, Director of Administration; Mark Turndahl, WPCA, Bill Brink WPCA; Matt Quinones, Director of Operations; Tony Romano, Management Analyst

#### Call to Order

##### Roll Call

**Welcome New Member:** Board of Representatives President Jeff Curtis

##### Approval of Minutes

##### Reports to the Board

- Update from Morgan Stanley Wealth Management
- Capital Projects Cash Flow Analysis (Quarterly: February, May, August, October)

##### Old Business

- None

##### New Business

- Review any transfer requests to/from Morgan Stanley
- Schedule May 2022 meeting
- Open Board discussion

## **Adjournment**