



## **Investment Advisory Committee Meeting**

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

### **Minutes**

#### **Regular Meeting**

**Wednesday April 20, 2022 11:00 AM**

#### **Conference Call**

**Joanne Noone called the meeting to order at 11:03 am Roll Call**

**Committee Members Attended:** Joanne Noone, Assistant Controller; Louis Casolo, City Engineer; Eric Newman, Accountant; Mary Lou Rinaldi, Board of Finance

**Committee Members Absent:** Jeff Curtis, Board of Reps; Vikki Cooper, Deputy Corporation Counsel

**Invited Attendees:** David R. Javaheri, Managing Director, Morgan Stanley Wealth Management; Sandy Dennies, Director of Administration; Bill Brink WPCA; Lee Berta, Assistant Director, Office of Policy & Management

**Approval of Minutes Motion to approve the revised minutes with the change of date to March 23, 2022 was made by Joanne Noone and seconded by Mary Lou Rinaldi Vote: Approved 4-0-0**

#### **Reports to the Board**

- Update from Morgan Stanley Wealth Management  
David R. Javaheri, Managing Director, Morgan Stanley Wealth Management provided an update and Investment Report

#### **Old Business**

- None

#### **New Business**

- None

#### **Review any transfer requests to/from Morgan Stanley**

- None

Scheduled next meeting Wednesday May 25, 2022 11:00 am

**Adjournment: Motion to adjourn made by Joanne Noone and seconded by Mary Lou Rinaldi**

**Vote: Approved 4-0-0 11:22 am**