



CITY OF STAMFORD
OFFICE OF LEGAL AFFAIRS
HUMAN RESOURCES DIVISION
888 WASHINGTON BOULEVARD
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TO: Mayor Caroline Simmons, Trustee (represented by Lee Berta, OPM)
Sandra Dennies, Trustee (represented by David Yanik, Controller)
Dr. Tamu Lucero, Superintendent of Schools, Trustee (represented by
Ryan Fealey, Director of Finance)
Jackie Heftman, President – Board of Education, Trustee
James Connors, Trustee
Anthony Valenti, Trustee
Todd Williams, Trustee

FROM: Custodian Pension Secretary

Please join The Custodian's Retirement Fund Meeting from your
computer, tablet or smartphone via the link below:

Join Zoom Meeting

<https://us02web.zoom.us/j/89208511452>

Meeting ID: 892 0851 1452

OR

One tap mobile

+1 646 558 8656 US (New York)

Meeting ID: 892 0851 1452

Find your local number: **<https://us02web.zoom.us/j/89208511452>**

The following items are on the Agenda for the February 16, 2023
Custodian's Retirement Fund Quarterly Meeting scheduled for **11:15 am**:

- A. Approval of the January 12, 2023 Custodian's Pension Fund Meeting Minutes
- B. Public Participation:
- C. Old Business:
 - i. **COLA Provisions:** Director Cava will continue to provide updates to the Trustees as they become available.
 - ii. **Pension Statement Distribution:** Director Cava will continue to provide updates to the Trustees as they become available.

D. New Business:

- i. F2023 YTD Financial Updates – David Yanik, Controller
- ii. Monthly Report – Joe DePalma, Jr., Principal Custody Solutions
- iii. Quarterly Investment Review – Mark Wetzel, Fiducient Advisors

E. Retirement: NONE

F. Disability Retirement: NONE

G. Return of Contributions: NONE

H. Vested: NONE

I. Bills:

- i. **Fiducient Advisors LLC** Invoice# 26_12312022 \$7,686.75
(Billing Period: October 01, 2022 to December 31, 2022)

cc: Douglas Dalena
Joe DePalma, Jr.
Bridget Fox
Alvin Frager
Rosemarie Frager
Vanessa Francis
Jennifer Jakic
James Lavin
Eugene Molgano
Valerie Pankosky
Elyse Pastore
Susan Rosenfeld
Valerie Rosenson
Angelo Sestito
Mark Wetzel
Town Clerk