



Investment Advisory Committee Meeting

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

Minutes

Regular Meeting

Wednesday September 13, 2023 11:00 AM

Conference Call

Joanne Noone called the meeting to order at 11:02 am Roll Call

Committee Members Attended: Joanne Noone, Assistant Controller; Louis Casolo, City Engineer; Eric Newman, Accountant; Mary Lou Rinaldi, Board of Finance; Jeff Curtis, Board of Reps; Dr. Elda Sinani, Director Office Of Policy & Management

Committee Members Absent: None

Invited Attendees: David R. Javaheri, Managing Director, Morgan Stanley Wealth Management; Bill Brink, Executive Director WPCA; Ben Barnes, Director of Administration; Tony Romano, Management Analyst

Motion to approve the Minutes of was made by Joanne Noone and seconded by Mary Lou Rinaldi Vote: Approved 6-0-0

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
- Update on the Capital Projects Cash Flow Analysis
 - Tony Romano, Management Analyst provided an update and report

Old Business

None

New Business

None

Review any transfer requests to/from Morgan Stanley

Scheduled next meeting Wednesday, October 11, 2023 11:00 am

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

Vote: Approved 6-0-0 11:22 am