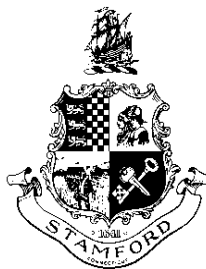


MAYOR  
CAROLINE SIMMONS



THOMAS M. CASSONE  
DIRECTOR OF LEGAL AFFAIRS  
&  
CORPORATION COUNSEL

DR. PAULA A. RUSSELL NISBETT  
DIRECTOR OF HUMAN RESOURCES

**CITY OF STAMFORD**  
**OFFICE OF LEGAL AFFAIRS**  
**HUMAN RESOURCES DIVISION**  
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Fax: (203) 977-4075

TO: Mayor Caroline Simmons  
Steven Bonaparte  
Jeff Curtis  
Eric Newman  
Mary Lou Rinaldi  
Joyce Sun

Thomas M. Cassone – Director of Legal  
Affairs & Corporation Counsel  
David Yanik – Controller

FROM: Classified Employees' Retirement Fund Secretary  
RE: **December 14, 2023** CERF Trustees Meeting at **9:00 AM**

Please join the Classified Employees' Retirement Fund Trustees Meeting  
from your computer, tablet or smartphone via the link below:

**Join Zoom Meeting**

**<https://us02web.zoom.us/j/89932269393>**

**Meeting ID: 899 3226 9393**

**OR**

**One tap mobile**

+1 646 558 8656 US (New York)

**Meeting ID: 899 3226 9393**

**Find your local number:** **<https://us02web.zoom.us/j/89932269393>**

**The following items are on the Agenda for the  
Classified Employees' Retirement Fund Trustees Meeting:**

**I. Minutes:**

- A.** Approval of the November 16, 2023 CERF Board Meeting Minutes

**II. Public Participation:**

**III. New Business:**

- A. Administrative Report – Northern Trust**
- B. F2023 YTD Financial Updates – David Yanik, Controller**
- C. Morgan Stanley Consulting Group:**
- i. Wealth Management Update
  - ii. Investment Performance Report

**D. Vested Pensions:** NONE

**E. Return of Contributions:**

i. Anthony Tedesco \$20,928.66

**F. Retirements:**

i. James Corley \$4,417.08  
ii. Herbert Robinson \$3,442.01  
iii. Sharon Wade \$2,305.16

**G. Disability Retirements:** NONE

**H. Buy Back:** NONE

**I. Bills:**

i. **Northern Trust** **Invoice# 992467931559** **TOTAL: \$27,496.66**  
Investment Management Services: July 1, 2023 – September 30, 2023

ii. **SLC Management** **Invoice# 977887 D** **TOTAL: \$14,604.73**  
3<sup>rd</sup> Quarter 2023 Fees (billed in arrears)

**J. Milliman: Request to approve individual pension calculations**

**K. CERF Trustee Election Results**

Cc: Benjamin Barnes  
Alfred Cava  
Dan Colleluori  
Bridget Fox  
Rosemarie Frager  
Vanesa Francis  
Jennifer Jakic  
David Javaheri  
Diana Kodanov  
Patti Koulouris  
James Lavin  
Susan Rosenfeld  
Valerie Rosenson  
Paula Russell Nisbett  
Town Clerk