



**CITY OF STAMFORD**  
**OFFICE OF LEGAL AFFAIRS**  
**HUMAN RESOURCES DIVISION**  
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**TO:** Mayor Caroline Simmons (represented by Elda Sinani, Director – OPM)  
David Yanik, Controller (represents Benjamin Barnes, Director of Administration)  
Ryan Fealey, Director of Finance (represents Dr. Tamu Lucero, Superintendent of Schools)  
Jackie Heftman, President – Board of Education, Trustee  
James Connors, Trustee  
Anthony Valenti, Trustee  
Todd Williams, Trustee

**FROM:** Custodian's Retirement Fund Secretary

**RE:** **February 15, 2024** Custodian's Retirement Fund Quarterly Meeting at **11:15 AM**

Please join the Custodians Retirement Fund Quarterly Meeting  
from your computer, tablet or smartphone via the link below:

**Join Zoom Meeting**

**<https://us02web.zoom.us/j/83959585281>**

**Meeting ID: 839 5958 5281**

**One tap mobile**

+1 646 558 8656 US (New York)

**Meeting ID: 839 5958 5281**

**Find your local number: <https://us02web.zoom.us/u/krHkFeWPj>**

**The following items are on the Agenda for the Custodian's Retirement Fund Quarterly Meeting:**

- A. Approval of the Minutes:** Custodian's Retirement Fund Meeting Minutes of January 11, 2024
- B. Public Participation:**
- C. New Business:**
  - i. Milliman COLA update** – Yelena Pelletier
  - ii. Principal Custody Solutions Monthly Report** – Joe DePalma, Jr.
  - iii. Review F2023 Draft Financial Statements** – David Yanik, Controller
  - iv. Fiducient Advisors** – Mark Wetzal, Timothy Ng, Matt Fratini
    - a. Performance**
    - b. Bond Manager Reallocation**
    - c. Quarterly Cash Needs for Benefit Payments**

**D. Retirements:**

- |                      |            |
|----------------------|------------|
| i. Louise Clemmensen | \$1,092.02 |
| ii. Honey Rechtman   | \$553.32   |

**E. Disability Retirements:** NONE

**F. Return of Contributions:** NONE

**G. Vested:** NONE

**H. Bills:** NONE

Cc: Thomas M. Cassone  
Joe DePalma, Jr.  
Bridget Fox  
Alvin Frager  
Rosemarie Frager  
Matt Fratini  
Vanesa Francis  
Jennifer Jakic  
James Lavin  
Eugene Molgano  
Timothy Ng  
Elyse Pastore  
Yelena Pelletier  
Susan Rosenfeld  
Valerie Rosenson  
Rebecca Sielman  
Paula Russell Nisbett  
Mark Wetzel  
Town Clerk