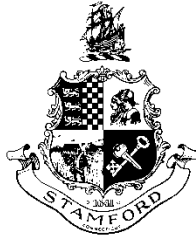


MAYOR
DAVID MARTIN



DIRECTOR OF LEGAL AFFAIRS
KATHRYN EMMETT

DIRECTOR OF HUMAN RESOURCES
ALFRED CAVA

CITY OF STAMFORD
OFFICE OF LEGAL AFFAIRS
HUMAN RESOURCES DIVISION
888 WASHINGTON BOULEVARD
P.O. BOX 10152
STAMFORD, CONNECTICUT 06904-2152
Tel. (203) 977-4070
Fax: (203)977-4075

TO: Mayor David Martin, 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)
Jennienne Burke, President – Board of Education, Trustee
Eugene Molgano, Union President, Trustee
Ronald Racaniello, Trustee
James Connors, 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/82524204628>

Meeting ID: 825 2420 4628

One tap mobile

+1 646 558 8656 US (New York)

Meeting ID: 825 2420 4628

Find your local number: <https://us02web.zoom.us/u/kcSh3EcrxG>

The following items are on the Agenda for the May 20, 2021 Custodian's Retirement Fund meeting
scheduled for 11:15 am:

- A. Approval of the April 8, 2021 Custodian's Pension Fund meeting Minutes
- B. Selection of the Custodian and Administrator of Benefit Payments – Christopher Foster, Procyon Partners
- C. Public Participation:
- D. Old Business:
 - i. Milliman:
 - Annual Statement of Benefits form
 - ii. New Hires/Pension Information: Scheduled informational meetings with a representative from Mass Mutual/Empower for both new hires and current employees

E. New Business:

- i. Wells Fargo Report – Joe DePalma, Jr.
- ii. Fiducient Advisors – Mark Wetzel (formerly DiMeo Schneider & Associates, L.L.C.-rebranded as of March 29, 2021)

F. Retirement: None

G. Disability Retirement: None

H. Return of Contributions:

- i. Anthony Carroll \$1,989.56
- ii. Cynthia Kakalettris \$9,743.93
- iii. Cinthya Perez-Martel \$2,183.66
- iv. Steven Summa \$11,936.70

I. Vested: None

J. Bills:

- i. City of Stamford Invoice# 033121-C \$790.77
(First Quarter Payment – Payroll Processing)
- ii. Fiducient Advisors Invoice# 0000262101 \$7,245.50
(Quarterly Consulting Fee)
- iii. Greenwich Hospital Invoice# 640063 \$250.00
(Medical Record Review)
- iv. Milliman, Inc. Invoice# 0054SCM0321 \$8,937.50
(Quarterly Retainer/Benefit Assistance)
- v. Robinson + Cole Invoice# 50341442 \$742.50
(Pension Plan Advice)
- vi. Wells Fargo Bank, N.A. Invoice# 13297812 \$2,955.50
(Period Fees: 01/01/2021 – 03/31/2021)

K. Possible Executive Session: Pending Pension Claim

cc: Alfred Cava
Joe DePalma, Jr.
Kathryn Emmett
Jennifer Jakic
James Lavin
Susan Rosenfeld
Valerie Rosenson
Angelo Sestito
Mark Wetzel
Town Clerk