



## Investment Advisory Committee Meeting

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

### Minutes

#### Regular Meeting

**Tuesday September 15, 2020 10:00 AM**

**Conference Call**

**Karen Vitale called the meeting to order at 10:02 am**

#### Roll Call

**Committee Members Attended:** Karen Vitale, Assistant Controller; Eric Newman, Accountant, Lindsey Miller, Board of Reps; Jay Fountain OPM Director; Mary Lou Rinaldi, Board of Finance, Vikki Cooper, Deputy Corporation Counsel

**Committee Members Absent:** Lou Casolo, City Engineer

**Invited Attendees:** David R. Javaheri, Managing Director, Morgan Stanley Wealth Management

#### Approval of Minutes

**Motion to approve the minutes was made by Jay Fountain and seconded by Lindsey Miller  
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

#### Old Business

- None

#### New Business

- City will be opening a money market bank account for operating funds at Bankwell  
Rate is 0.80%
- Scheduled next meeting Tuesday October 20, 2020 10:00 am

**Adjournment: Motion to adjourn made by Mary Lou Rinaldi and seconded by Lindsey Miller  
Vote: Approved 6-0-0 10:22 am**