

MAYOR
CAROLINE SIMMONS



DIRECTOR OF LEGAL AFFAIRS
&
CORPORATION COUNSEL
DOUGLAS C. DALENA

ALFRED C. CAVA, SHRM-SCP, SPHR
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CITY OF STAMFORD
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TO: Mayor Caroline Simmons David Yanik – Controller
Steven Bonaparte Douglas Dalena – Corporation Counsel
Jeff Curtis
Eric Newman
Mary Lou Rinaldi
Joyce Sun

FROM: Alfred Cava, CERF Secretary
RE: October 13, 2022 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/88427114500>
Meeting ID: 884 2711 4500

One tap mobile
+1 646 558 8656 US (New York)
Meeting ID: 884 2711 4500

OR

Find your local number: <https://us02web.zoom.us/j/88427114500>

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

I. Minutes:

A. Approval of the September 8, 2022 CERF Board Meeting Minutes

II. Public Participation:

III. New Business:

A. Review June 30, 2022 Financials (Draft Version) – David Yanik, Controller

B. Administrative Report – Anabel Arguello, Northern Trust

C. Morgan Stanley Consulting Group:

- i. Wealth Management Update
- ii. Investment Performance Report
- iii. Portfolio Analysis

D. Vested Pensions: NONE

E. Return of Contributions:

- i. Nicolle Cornejo \$3,208.05
- ii. Cynthia Caban-Register \$5,666.82

F. Retirements:

- i. Jacqueline Bogacki \$2,698.44
- ii. Paulet Frazer \$1,187.34*
*Monthly Benefit if approved would be effective: May 01, 2017

- iii. Nancy Pipicelli \$4,870.84
- iv. Patricia Stosuy \$3,078.75
- v. Elaine Zehren \$2,445.73

G. Disability Retirements: NONE

H. Buy Back: NONE

I. Bills:

- i. Milliman Invoice# 0054SCE010922 \$20,945.00
(Quarterly Retainer: October – December 2022; Benefit Assistance)
- ii. Robinson+Cole Invoice# 50376511 \$148.50
(Legal Services Fees)
- iii. Robinson+Cole Invoice# 50389015 \$247.50
(Legal Services Fees)

J. Discussion on Annual Pension Statements

Cc: Anabel Arquello David Javaheri
Dan Colleluori Patti Koulouris
Sandra Dennies James Lavin
Bridget Fox Susan Rosenfeld
Rosemarie Frager Valerie Rosenson
Vanessa Francis Angelo Sestito
Jennifer Jakic Town Clerk