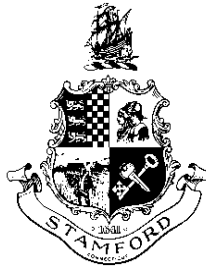


MAYOR
CAROLINE SIMMONS



THOMAS M. CASSONE
DIRECTOR OF LEGAL AFFAIRS
&
CORPORATION COUNSEL

ALFRED C. CAVA, SHRM-SCP, SPHR
DIRECTOR OF HUMAN RESOURCES

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
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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: Alfred Cava, Classified Employees' Retirement Fund Secretary
RE: **May 18, 2023** CERF Trustees **Quarterly** Meeting at **9:15 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/84278814562>
Meeting ID: 842 7881 4562

OR

One tap mobile
+1 646 558 8656 US (New York)
Meeting ID: 842 7881 4562

Find your local number: <https://us02web.zoom.us/u/kiuyUBpx9>

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

I. Minutes:

A. Approval of the April 20, 2023 CERF Board Meeting Minutes

II. Public Participation:

III. New Business:

A. **Northern Trust** – Diana Kodanov

i. Administrative Report

B. Morgan Stanley Consulting Group:

- i. Wealth Management Update
- ii. Investment Performance Report
- iii. Discussion on opening a Delivery vs Purchase (DVP) account at Morgan Stanley

C. Vested Pensions:

i. Lisa Reynolds \$1,416.79

D. Return of Contributions:

- i. Ewa Kaluzynska \$2,316.22
- ii. Bertrand Oubida \$20,548.57
- iii. Beatriz Veltze \$37,197.49

E. Retirements:

- i. Lenora Blefari* \$2,451.15
*QDRO
- ii. Patricia Cunningham \$4,598.04

F. Disability Retirements: NONE

G. Buy Back: NONE

H. Plan Document Amendments: Actuarial Assumptions

- i. Domestic Relations Orders (3.2)
- ii. Joint and Survivor Options (9.3)

I. Bills:

i. Milliman	Invoice# 0054SCE01 03 23	TOTAL:	\$7,425.00
Basic Services: Quarterly Retainer April – June 2023	\$5,250.00		
Benefit Assistance Calculations	\$2,175.00		
ii. Robinson+Cole	Invoice# 50414806	TOTAL:	\$742.50
iii. SLC Management	Invoice# 9778568 D	TOTAL:	\$14,379.49
1st Quarter 2023 Fees (billed in arrears)			

Cc: Dan Colleluori
Sandra Dennies
Bridget Fox
Rosemarie Frager
Vanesa Francis
Jennifer Jakic
David Javaheri
Diana Kodanov
Patti Koulouris
James Lavin
Valerie Pankosky
Susan Rosenfeld
Valerie Rosenson
Angelo Sestito
Town Clerk