



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 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: Alfred Cava, Custodian’s Retirement Fund Secretary

RE: **September 14, 2023** Custodian’s Retirement Fund Regular Meeting at **11:00 AM**

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

Join Zoom Meeting

<https://us02web.zoom.us/j/84113543369>

Meeting ID: 841 1354 3369

OR

One tap mobile

+1 646 558 8656 US (New York)

Meeting ID: 841 1354 3369

Find your local number: <https://us02web.zoom.us/u/kdPkdEDnH8>

The following items are on the Agenda for the Custodian’s Retirement Fund Meeting:

A. Approval of the Minutes: Custodian’s Retirement Fund Meeting Minutes of July 20, 2023

B. Public Participation:

C. Old Business:

- i. **COLA Provisions:** Director Cava will continue to provide updates to the Trustees as they become available.
- ii. **On-line Pension Statement:** Director Cava will continue to provide updates regarding the on-line system to the Trustees as they become available.

D. New Business:

- i. Principal Custody Solutions – Joe DePalma, Jr.

E. Retirement:

| | | |
|-------|-------------------|------------|
| i. | David Borsey | \$3,680.23 |
| ii. | Revie Catchings | \$2,961.32 |
| iii. | Barbara McAuliffe | \$1,018.50 |
| iv. | Andrea McIntosh | \$1,600.11 |
| v. | Jesse McIntosh | \$2,884.22 |
| vi. | James Piorkowski | \$3,921.79 |
| vii. | Lisa Poltrack | \$706.95 |
| viii. | Dolores Spoto | \$1,056.14 |

F. Disability Retirement:

- i. Paul Schell \$3,305.58*

** The Disability Pension for Paul Schell was approved effective July 1, 2023 at the July 20, 2023 meeting. The information listed above is an update on the final Milliman calculations.*

G. Return of Contributions:

| | | |
|-----|--------------|------------|
| i. | Shakia Brown | \$6,527.76 |
| ii. | Beth Keenan | \$7,732.83 |

H. Vested: NONE

I. Bills:

| | | | |
|-----|--|-----------------------------|-------------------|
| i. | Fiducient Advisors | Invoice# 26_09302023 | \$7,917.35 |
| | Quarterly Consulting Fees: July 1, 2023 – September 30, 2023 | | |
| ii. | Robinson+Cole | Invoice# 50427974 | \$148.50 |
| | Fees for Legal Services | | |

Cc: Thomas M. Cassone
 Joe DePalma, Jr.
 Bridget Fox
 Alvin Frager
 Rosemarie Frager
 Vanesa Francis
 Jennifer Jakic
 James Lavin
 Eugene Molgano
 Elyse Pastore
 Susan Rosenfeld
 Valerie Rosenson
 Angelo Sestito
 Town Clerk