

MAYOR  
CAROLINE SIMMONS



THOMAS M. CASSONE  
DIRECTOR OF LEGAL AFFAIRS  
&  
CORPORATION COUNSEL

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DIRECTOR OF HUMAN RESOURCES

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**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:** Custodian’s Retirement Fund Secretary

**RE:** **November 16, 2023** Custodian’s Retirement Fund Quarterly Meeting at **11:15 AM**

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/87507892237>**

**Meeting ID: 875 0789 2237**

**OR**

**One tap mobile**

+1 646 558 8656 US (New York)

**Meeting ID: 875 0789 2237**

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

**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 October 12, 2023
- B. Public Participation:**
- C. Old Business:**
  - i. COLA Provisions
  - ii. Milliman MARC On-line Pension Statement
- D. New Business:**
  - i. Principal Custody Solutions Monthly Report – Joe DePalma, Jr.
  - ii. Quarterly Investment Review – Fiducient Advisors

**E. Retirement:**

i. Samuel LaBella \$4,746.20

**F. Disability Retirement: NONE**

**G. Return of Contributions: NONE**

**H. Vested: NONE**

**I. Bills:**

i. **Milliman** Invoice# **54SCM0923** TOTAL: **\$20,305.00**  
Quarterly Retainer for July – September 2023; October – December 2023  
Benefit Assistance

**J. Update: Milliman Pension Administration Fees**

**K. Discussion and possible vote: 2024 Custodian’s Retirement Fund Meeting dates**

Cc: Thomas M. Cassone  
Alfred Cava  
Joe DePalma, Jr.  
Bridget Fox  
Alvin Frager  
Rosemarie Frager  
Vanesa Francis  
Matthew Fratini  
Jennifer Jakic  
James Lavin  
Eugene Molgano  
Timothy Ng  
Elyse Pastore  
Susan Rosenfeld  
Valerie Rosenson  
Paula Russell Nisbett  
Mark Wetzel  
Town Clerk