

MAYOR
CAROLINE SIMMONS



THOMAS M. CASSONE
DIRECTOR OF LEGAL AFFAIRS
&
CORPORATION COUNSEL

DR. PAULA A. RUSSELL NISBETT
DIRECTOR OF HUMAN RESOURCES

CITY OF STAMFORD
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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

FROM: Classified Employees' Retirement Fund Secretary
RE: **March 14, 2024** CERF Trustees Quarterly 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/81456487191>

Meeting ID: 814 5648 7191

OR

One tap mobile

+1 646 558 8656 US (New York)

Meeting ID: 814 5648 7191

Find your local number: **<https://us02web.zoom.us/u/kbgI6MRrQ3>**

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

- I. Minutes:**
 - A. Approval of the February 15, 2024 CERF Board Meeting Minutes
- II. Public Participation:**
- III. New Business:**
 - A. **Administrative Report** – Northern Trust
 - B. **Morgan Stanley Consulting Group:**
 - i. Wealth Management Update
 - ii. Investment Performance Report

C. Vested Pensions: NONE

D. Return of Contributions:

- i. Debra Casey
 - a. Designate Beneficiary
 - b. ROC

E. Retirements:

- i. Frank Conti \$2,648.94
- ii. David Yanik \$3,994.03

F. Disability Retirements: NONE

G. Buy Back: NONE

H. Bills:

- i. **Milliman** Invoice# 57STM0502245 TOTAL: \$9,535.77
Fees & Services: January 1, 2024 to January 31, 2024
- ii. **Northern Trust** Invoice# 992460212942 TOTAL: \$29,942.91
Product & Services: October 1, 2023 to December 31, 2023
- iii. **SLC Management (U.S.) LLC** Invoice# 9779022 D TOTAL: \$15,001.11
Billed Quarterly; Paid in Arrears: 4th Quarter 2023

Cc: Benjamin Barnes
Dan Colleluori
Bridget Fox
Rosemarie Frager
Vanessa Francis
John Guzzino
Jennifer Jakic
David Javaheri
Diana Kodanov
Patti Koulouris
James Lavin
Susan Rosenfeld
Valerie Rosenson
Paula Russell Nisbett
Town Clerk