

MAYOR
CAROLINE SIMMONS



THOMAS M. CASSONE
DIRECTOR OF LEGAL AFFAIRS
&
CORPORATION COUNSEL

DR. PAULA A. RUSSELL
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
Fax: (203) 977-4075

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: **October 10, 2024** CERF Trustees Regular Meeting at **9:00 AM**

Please join the Classified Employees' Retirement Fund Trustees Regular 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 Regular Meeting:**

- I. **Minutes:** Approval of the September 12, 2024 CERF Board Meeting Minutes
- II. **Public Participation:**
- III. **New Business:**
 - A. **City of Stamford–Dr. Paula Russell, Director of Human Resources & Laura Bucher, Milliman**
 - i. Memo – Public Participation Inquiry regarding potential COLA costs
 - ii. Memo - Death Audit Recommendation
 - iii. Memo – MAA Union Request & City Response
 - B. **Administrative Report** – Northern Trust

C. Morgan Stanley Consulting Group:

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

D. Vested Pensions:

- i. Thomas Greco \$376.50
- ii. Ann Lepore \$1,545.57

E. Return of Contributions:

- i. Elizabeth Gomez \$23,253.64
- ii. Eugene Robles \$6,586.45

F. Retirements:

- i. Robert O'Connor \$2,865.93
- ii. Robert Huntley \$3,695.03

G. Disability Retirements:

- i. Agazio DiMasi \$2,405.84

H. Buy Back: NONE

I. Bills:

- i. Milliman** Invoice# 54SCE0924 TOTAL: \$15,281.25
Benefit Assistance & Quarterly Retainer: October 1, 2024 – December 31, 2024
- ii. Morgan Stanley** Invoice# 10916024276 TOTAL: \$12,500.00
Consulting Services: October 1, 2024 – December 31, 2024
- iii. Northern Trust** Invoice# 992462576676 TOTAL: \$31,569.64
Product and Services: April 1, 2024 – June 30, 2024
- iv. Robinson+Cole** Invoice# 50469419 TOTAL: \$99.00
Fees for Legal Services: August 2024
- iii. SLC Management** Invoice# 9779327 D TOTAL: \$15,482.15
Q2 2024: April 1, 2024 – June 30, 2024

J. Discussion on 2025 Meeting Dates

Cc: Benjamin Barnes
Laura Bucher
Thomas M. Cassone
Dan Colleluori
Bridget Fox
Rosemarie Frager
Vanessa Francis
John Guzzino
Jennifer Jakic
David Javaheri
Diana Kodanov
Patti Koulouris
James Lavin
Barbara Montalvo
Joanne Noone
Paula Russell
Teresa Viscariello
Town Clerk