



**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)  
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 21, 2024 Custodian's Retirement Fund Quarterly Meeting at 11:15 AM

Please join the Custodians Retirement Fund Meeting  
from your computer, tablet or smartphone via the link below:

**Join Zoom Meeting**

**<https://us02web.zoom.us/j/83959585281>**

**Meeting ID: 839 5958 5281**

**One tap mobile**

+1 646 558 8656 US (New York)

**Meeting ID: 839 5958 5281**

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

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

- I. Approval of the Minutes:** Custodian's Retirement Fund Meeting Minutes of October 10, 2024
- II. Public Participation:**
- III. Old Business:** Pending items
  - A. Board of Education** – Process and procedures in calculating leave of absences and/or breaks in services for pension payments.
  - B. Pension Counsel Services** – Updating the Fund Summary Plan Description Document (SPD). Pension Counsel, Bruce Barth is gathering the information for the Trustees to review, a report will be forthcoming.
  - C. 2023 Benefit Statements** – Recently received the information from the Board of Education. The mailing will be distributed after an analysis of the data.

**IV. New Business:**

**A. Principal Custody Solutions Monthly Report – Joe DePalma, Jr.**

i. Report

**B. Fiducient Advisors**

i. Reports

ii. Recommendations

**C. Retirements:**

i. Daniel Greco \$4,481.97

**D. Disability Retirements: NONE**

**E. Return of Contributions: NONE**

**F. Vested: NONE**

**G. Bills:**

**i. City of Stamford Invoice# 1000-0000-120006 TOTAL: \$267.75**

January 2024 Postage Charges

**ii. Milliman Invoice# 54SCM092402 TOTAL: \$1,202.50**

Special Services: GASB Report Dated July 2, 2024

**iii. Robinson+Cole Invoice# 50471672 TOTAL: \$346.50**

Fees for Legal Services: September 2024

Cc: Thomas M. Cassone  
Joe DePalma, Jr.  
Bridget Fox  
Alvin Frager  
Rosemarie Frager  
Vanessa Francis  
John Guzzino  
Lucas Hannegan  
Jennifer Jakic  
James Lavin  
Eugene Molgano  
Barbara Montalvo  
Timothy Ng  
Joanne Noone  
Elyse Pastore  
Susan Rosenfeld  
Paula Russell  
Teresa Viscariello  
Town Clerk