

Mayor  
DAVID MARTIN



DIRECTOR OF LEGAL AFFAIRS  
KATHRYN EMMETT  
DIRECTOR OF HUMAN RESOURCES  
ALFRED CAVA

**CITY OF STAMFORD**  
**OFFICE OF LEGAL AFFAIRS**  
**HUMAN RESOURCES DIVISION**  
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TO: Mayor David Martin, Trustee (represented by Lee Berta, OPM)  
Sandy Dennies, Trustee (represented by David Yanik, Controller)  
Dr. Tamu Lucero, Superintendent of Schools, Trustee (represented by  
Ryan Fealey, Director of Finance)  
Andy George, President – Board of Education, Trustee  
Ronald Racaniello, Trustee  
James Connors, Trustee  
Todd Williams, Trustee

FROM: Custodian Pension Secretary

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/87807537194>

**Meeting ID: 878 0753 7194**

**One tap mobile**

+1 646 558 8656 US (New York)

**Meeting ID: 878 0753 7194**

OR

Find your local number: <https://us02web.zoom.us/u/kbwDOFUO2>

The following items are on the agenda for the November 19, 2020 Custodian's Retirement Fund meeting scheduled for 11:15 am:

- A. Approval of the October 8, 2020 Custodian Pension Fund meeting Minutes
- B. Public Participation:
- C. New Business:
  - i. Wells Fargo Report – Joe DePalma, Jr.
  - ii. Fiduciary Investment Advisors – Mark Wetzel
  - iii. Review of Financial Statements for YTD – David Yanik

D. Retirement:

Ruth Cohen	\$554.13	\$6,649.60
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E. Disability Retirement: None

F. Return of Contributions:

Steven Cornelio	\$98,952.91
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Giovanna Parre	\$1,029.77
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G. Vested: None

H. Bills:

- |   |                      |                     |
|---|----------------------|---------------------|
| i. City of Stamford<br>(Payroll Processing Charges - 3rd Quarter 2020)            | Invoice# 093020-C    | \$760.53            |
| ii. Milliman<br>(Quarterly Retainer: October – December 2020; Benefit Assistance) | Invoice# 0054SCM0920 | \$5,937.50          |
| iii. Robinson + Cole<br>(Pension Plan Advice)                                     | Invoice# 50322371C+M | \$91.00             |
| iv. *Wells Fargo<br>(Period Fees: 07/01/2020 – 09/30/2020)                        | Invoice# 13039553    | Balance Due: \$0.00 |

\*Vote would be to approve the auto-charge amount: \$2,657.00

I. Discussion regarding 2021 Custodian Pension Fund meeting dates (possible vote)

cc: Alfred Cava  
Joe DePalma, Jr.  
Alicia Edwards  
Kathy Emmett  
Susan Rosenfeld  
Valerie Rosenson  
Angelo Sestito  
Mark Wetzel  
Town Clerk