



Investment Advisory Committee Meeting

STAMFORD GOVERNMENT CENTER
888 WASHINGTON BOULEVARD
P.O. BOX 10152
STAMFORD, CONNECTICUT 06904-2152

AGENDA

Regular Meeting

Friday, October 10, 2014: 10:00 AM

Democratic Caucus Room Room, 4th Floor

Committee Members: Karen Vitale, Assistant Controller; Jay Fountain Board of Reps; Louis Casolo, City Engineer; Vikki Cooper, Deputy Corporation Counsel; Mary Lou Rinaldi, Board of Finance

Invited Attendees: Eric Newman, Accountant, David R. Javaheri, David R. Javaheri, CIMA Executive Director & Senior Portfolio Manager, Morgan Stanley Wealth Management

Call to Order

Roll Call

Approval of Minutes

Reports to the Board

- Update from Morgan Stanley Wealth Management
- Investment Report

Old Business

- Review the Investment Policy
- Discussion of Investing Bond Proceed

New Business

- Discussion of reporting of investment by type and risk level and return on investments
- Review any transfer requests to/from Morgan Stanley
- Schedule future meetings
- Open Board discussion

Adjournment