



Investment Advisory Committee Meeting

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

AGENDA

Regular Meeting

Friday, November 7, 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, Eric Newman, Accountant

Invited Attendees: Stephen Sams, Financial Advisor Morgan Stanley Wealth Management; David R. Javaheri, CIMA Executive Director & Senior Portfolio Manager, Morgan Stanley Wealth Management

Conference In:

David R. Javaheri, CIMA Executive Director & Senior Portfolio Manager, Morgan Stanley Wealth Management (781-416-2491)

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

- Review any transfer requests to/from Morgan Stanley

- Opening a bank account outside of Morgan Stanley
- Open Board discussion

Adjournment