



## Investment Advisory Committee Meeting

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

### AGENDA

#### Regular Meeting

**Thursday, June 18, 2015: 10:00 AM**

**Democratic Caucus Room, 4<sup>th</sup> 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 (401-845-3513); 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

##### New Business

- Review any transfer requests to/from Morgan Stanley
- Renewal Extension of Morgan Stanley – The Javaheri Group contract expires 8/6/2015
- Schedule next quarters meetings
- Open Board discussion

##### Adjournment