Investment Advisory Committee Meeting

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

AGENDA

Regular Meeting
Friday, June 5, 2015: 10:00 AM
Democratic Caucus 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 (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
- Schedule next quarters meetings
- Open Board discussion

Adjournment