

MAYOR
CAROLINE SIMMONS



THOMAS M. CASSONE
DIRECTOR OF LEGAL AFFAIRS
&
CORPORATION COUNSEL

DR. PAULA A. RUSSELL
DIRECTOR OF HUMAN RESOURCES

CITY OF STAMFORD
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TO: Mayor Caroline Simmons (represented by Elda Sinani, Director – OPM)
Leah Kagan, Director of Economic Development & Acting Director of Administration
Ryan Fealey, Director of Finance (represents Dr. Tamu Lucero, Superintendent of Schools)
Andy George, President – Board of Education, Trustee
James Connors, Trustee
Anthony Valenti, Trustee
Todd Williams, Trustee

FROM: Custodian’s Retirement Fund Secretary

RE: **February 12, 2026** Custodian’s Retirement Fund Quarterly Meeting at **11:15 AM**

Please join the Custodians Retirement Fund Meeting
from your computer, tablet or smartphone via the link below:

Microsoft Teams [Need help?](#)
[Join the meeting now](#)
Meeting ID: 282 917 175 019 07
Passcode: gt68C7pK

Dial in by phone
[+1 929-346-7262,708397648#](#) United States, New York City
[Find a local number](#)
Phone conference ID: 708 397 648#

The following items are on the Agenda for the Custodian’s Retirement Fund Meeting:

- I. **Approval of the Minutes:** Custodian’s Retirement Fund Meeting Minutes of January 8, 2026
- II. **Public Participation:** TBA
- III. **Old Business:** NONE
- IV. **New Business:**
 - A. **City of Stamford – Human Resources Division**
 - i. Chair Responsibilities & Meeting Administration

B. Custodians and Mechanics' Retirement Fund 2024 financial statements – CBIZ CPAs P.C.

C. Principal Custody Solutions Monthly Report – Joe DePalma, Jr.

- i. Report

D. Fiducient Advisors

- i. Quarterly Investment Review – Fourth Quarter 2025
- ii. Recommendation to raise cash

E. Retirements:

- i. Mary Bacon \$786.05

F. Disability Retirements: NONE

G. Return of Contributions:

- i. Valerie Basciano \$13,502.07

H. Vested: NONE

I. Bills:

- i. **City of Stamford** Invoice# **FY2023 Audit Fees** **TOTAL: \$20,000.00**
Fiscal Year 2023 Audit Fees
- ii. **Milliman** Invoice# **54SCM011225** **TOTAL: \$7,641.25**
Quarterly Retainer: January – March 2026
Benefit Assistance
- iii. **Principal Custody Solutions** Invoice# **13774908** **TOTAL: \$3,057.39**
Period Fees: October 1, 2025 – December 31, 2025

Cc: Thomas M. Cassone
Joe DePalma, Jr.
Bridget Fox
Alvin Frager
Rosemarie Frager
John Guzzino
Jennifer Jakic
Elyse Pastore
Susan Rosenfeld
Paula Russell
Teresa Viscariello
Town Clerk