PENSION BOARD VIA TELECONFERENCE AT 6:00 PM

A G E N D A PENSION AND RETIREMENT BOARD MEETING July 15, 2021

- 1. Call to Order:
- 2. Roll Call:
- 3. Disposition of Minutes: Meeting of June 17, 2021
- 4. Chairman Report:
- 5. New Business: Revoke Vested Pension for Matthew J. Dwyer approved by the Board on January 16, 2020.
- 6. Old Business:
- 7. Executive Session:
- 8. Pension Requests:

a)	Silvestre (Sly) Moura III	Code 5 – City (MSA) Normal		Calculation
b)	Mark D. Robinson	Code 5 – City (Public Works) Normal		Calculation
c)	James Whitaker	Code 5 – BOE Normal w/ 50% Contingent Anr	 nuitant	Application/ Calculation
d)	Gary Zupansky	Code 5 – BOE (Maint) Normal		Application/ Calculation

9. Withdrawals and Refunds:

a)	Deanna Diamond	Code 9 – Community Development (MEA) Entered: 11/10/2014 Terminated: 04/30/2021				
10.	Buy Ins:	NONE				
11. Contingent Annuitant Option:						
а) Robert Smith	Code 5 – BOE (Maint) 100% Contingent Annuitant Beneficiary: Eileen Smith	Application			

12. Applications of Entry:

a)	Kelley Brown	Code 5 – BOE (Secretary)	Entry: 07/01/2021
b)	Matthew J. Dwyer	Code 5 – City (Public Works)	Entry: 06/28/2021
		Adjusted I	Pension Date: 10/25/2007
c)	Carly Iuliano	Code 9 – City (MEA)	Entry: 06/29/2021
d)	Julie Marie Natoli	Code 5 – BOE (Food Services)	Entry: 06/03/2021
e)	Jeanette M. Tierney	Code 5 – City (Public Works)	Entry: 06/14/2021
f)	Dane Williams	Code 5 – City (Public Works)	Entry: 06/01/2021

13. Invoices:

a)	Tocqueville	\$ 3,887.46	Period: 1/1/2020 – 3/31/2021
b)	Wells Fargo	\$ 1,648.40	Period: 5/1/2021 – 5/31/2021
c)	Beirne Wealth	\$ 96,703.77	Period: 7/1/2021 – 9/30/2021
d)	Michael J. Paolini, C.P.A.	\$ 4,800.00	Period: 6/11/2021

- 14. Committee Reports: NONE
- 15. Financial Report: Financial Statements (Six Months ended 12/31/2020) Michael J Paolini, CPA
- 16. Asset Allocation: NONE
- 17. Report of Investment Advisor: NONE
- 18. Adjourn

Any individual with a disability who needs special assistance to participate in the meeting should contact the Director of Community Development, 203-783-3230, five days prior to the meeting if possible.