

**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) -- Calculation  
Normal
  - b) Mark D. Robinson Code 5 – City (Public Works) -- Calculation  
Normal
  - c) James Whitaker Code 5 – BOE -- Application/ Calculation  
Normal w/ 50% Contingent Annuitant
  - d) Gary Zupansky Code 5 – BOE (Maint) -- Application/ Calculation
- 9. Withdrawals and Refunds: NONE**
  - a) Deanna Diamond Code 9 – Community Development (MEA)  
Entered: 11/10/2014 Terminated: 04/30/2021
- 10. Buy Ins: NONE**
- 11. Contingent Annuitant Option:**
  - a) Robert Smith Code 5 – BOE (Maint) -- Application  
100% Contingent Annuitant  
Beneficiary: Eileen Smith

**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 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.**