



TOWN OF GREENWICH

**BOARD OF ESTIMATE & TAXATION
INVESTMENT ADVISORY COMMITTEE and OPEB TRUST BOARD
CONCURRENT MEETING**

Thursday, January 12, 2023 – 10:00 A.M.

**Mazza Room
1st Floor, Town Hall**

AGENDA

1. Approval of the BET Investment Advisory Committee Meeting Minutes of December 6, 2022
2. Review of OPEB Trust investments – Brian D. Binkley, Vanguard Institutional Advisory Services:
 - Review of market conditions
 - OPEB Trust Portfolio performance results and asset allocation as of December 31, 2022
 - Updated forecast on expected return on assets
 - 2023 economic and market outlook
3. Update on the RFP for actuary services for the OPEB Trust
4. Review of Treasury Reports:
 - Town's cash position and invested cash allocations on December 31, 2022
 - Bank interest rates and ECR
 - Investments in U.S. Treasury Bills
 - CD Portfolio holdings
 - General Fund monthly cash flows: actual for December 2022 and projected for the remainder of fiscal year 2023
5. Old Business
6. New Business
7. Adjournment

Next IAC Meeting: Monday, February 13, 2023 at 10:00 A.M. in the Mazza Room.

The Town complies with all applicable federal and state laws regarding non-discrimination, equal opportunity, affirmative action, and providing reasonable accommodations for persons with disabilities. If you require an accommodation to participate, please contact the Commissioner of Human Services at 203-622-3800 or demetria.nelson@greenwichct.org as soon as possible in advance of the event.