



**TOWN OF GREENWICH  
BOARD OF ESTIMATE & TAXATION**

**INVESTMENT ADVISORY COMMITTEE and OPEB TRUST BOARD  
CONCURRENT MEETING**

**Monday, July 24, 2023 – 10:00 A.M.**

**Mazza Room  
1<sup>st</sup> Floor, Town Hall**

**AGENDA**

1. Approval of the BET Investment Advisory Committee Meeting Minutes of June 7, 2023
2. Review of market conditions, OPEB Trust Portfolio performance results and asset allocation as of June 30, 2023 – Vanguard
3. OPEB Board Chair reappointment for FY2024
4. Review of Treasury Reports:
  - Town's cash position and invested cash allocations on June 30, 2023
  - Bank interest rates and earnings credit rates
  - Investments in U.S. Treasury Bills
  - CD Portfolio holdings
  - General Fund monthly cash flows: actual for June 2023 and projected for fiscal year 2024
5. Old Business
6. New Business
7. Adjournment

Next IAC Meeting: Thursday, September 7, 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](mailto:demetria.nelson@greenwichct.org) as soon as possible in advance of the event.*