



TOWN OF BRIDGEWATER CONNECTICUT

P.O. Box 216, 44 Main Street South, Bridgewater CT 06752

BRIDGEWATER BOARD OF TRUSTEES

AGENDA

Thursday, Oct 22, 2020

Zoom: 7:00PM

1. Approval of Minutes for July 23rd, 2020 meeting
2. Portfolio reviews and investment changes/recommendations:

Scholarship Funds

- Bridgewater Scholarship Fund
- Jespersen Scholarship Fund
- Gould Fund
- Margaret Ford Fund

Other Funds

- Richard T. Harris Fund
- Burnham Fund
- Land Acquisition Fund
- Bridgewater Library Fund

Old Business –

Status of Reallocation of Investments of CD Accounts with USB/Raymond James

-Patrick will update us on resolve of the ongoing issue with BOF consulting with a legal. He will propose to put funds aside to deal with this situation properly for the future.

- Meeting with Ameriprise at 1st, 2nd and 4th Quarter meetings
Of Course if there is important business to review they would be available and present.

Set upcoming meeting dates for 2021

NEW Business –

Adjourn