



TOWN OF BRIDGEWATER CONNECTICUT

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

BRIDGEWATER BOARD OF TRUSTEES

AGENDA

Thursday, May 28, 2020

Town Hall: 7:00PM

1. Approval of Minutes for January 29, 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 again try to resolve 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.

Reviewed upcoming meeting dates for 2020

Thursday July 23rd

Thursday October 22nd

NEW Business –

Adjourn