

Bridgewater Board of Trustees

Town of Bridgewater

Town Hall • P.O. Box 216 • Bridgewater, CT 067542
Ned W. Bandler • Chairman • (860) 350-4921

October 13, 2009

Board of Trustees Meeting
Thursday, October 22, 2009
Town Hall
6:00 PM

AGENDA

1. Approval of Minutes of July 23, 2009 meeting and Special Meeting held on August 25, 2009
2. Update on transfer of Town investment accounts from UBS to Merrill Lynch by Carl Cascella, Advisor to the Board of Trustees
3. Report on market trends and developments by Carl Cascella. Discussion of 2009 results for nine months ending September 30, and comment on current investment strategy and guidelines.
4. Portfolio reviews and action on investment decisions:
 - Brooks Piggot/Cowin Fund
 - Bridgewater Library Fund
 - Bridgewater Library Growth Fund
 - Bridgewater Scholarship Fund
 - Doris and Reider Jespersen Scholarship Fund
 - Richard T. Harris Fund
 - Burnham Fund
 - Gould Fund
 - Open Space and Land Acquisition Fund
5. New Business
6. Adjourn