



INVESTMENT ADVISORY COMMITTEE MEETING

TOWN OF PALM BEACH

SEPTEMBER 19, 2025

2:30 PM

TOWN HALL COUNCIL CHAMBERS, 2ND FLOOR | 360 SOUTH COUNTY RD | PALM BEACH, FL 33480

Chris Storkerson, Chair
Kathleen Anderson, Vice Chair
Laurence Austin, Member
Jacqueline de Sanctis, Member
Lloyd McAdams, Member

AGENDA

CALL TO ORDER AND ROLL CALL

PLEDGE OF ALLEGIANCE

ELECTION OF CHAIR AND VICE CHAIR

MINUTES

1. Minutes from May 16, 2025 Meeting

APPROVAL OF AGENDA

COMMENTS

2. OFFICIALS
3. STAFF
4. PUBLIC - 3 MINUTE LIMIT

GENERAL BUSINESS

5. Mariner Quarterly Performance Report - Dave West
6. July Investment Report - Melissa Ladd, Controller
7. Quarterly Report for the Oversight of One-Cent Surtax - Bob Miracle, Deputy Town Manager
8. PFM Asset Management Quarterly Performance Report - Matthew Dinallo
9. OPEB Trust Financial Report - Melissa Ladd, Controller

ANY OTHER BUSINESS

MEETING SCHEDULE

10. The next meeting is scheduled for Friday, November 14, 2025 at 2:30PM

ADJOURNMENT

Access this meeting video on the 'Public Meetings' page at www.townofpalmbeach.com.

If a person decides to appeal any decision made with respect to any matter considered at this meeting, they will need to ensure that a verbatim record of the proceedings is made for such purposes, which shall include the testimony and evidence upon which the appeal is to be based.

Disabled persons needing accommodations to participate in this meeting should contact the Town Clerk's Office at (561) 838-5416 at least one day prior to the meeting.