



Ocala General Employees' Retirement Fund Board of Trustees Agenda - Final Monday, May 13, 2024

Meeting Information

Location

Ocala City Hall, CMO Conference Room
City Manager's Conference Room
Second Floor
110 SE Watula Ave

Time

9:00 AM

Trustees

Casey, Tom
Trustee

Lyn Cole
Trustee

Anthony Ortiz
Trustee

Arnie Hersh
Trustee

Charlie Varney
Trustee

WELCOME!

We are very glad you have joined us for today's meeting. If reasonable accommodations are needed for you to participate in this meeting, please call Alicia Gaither at (352) 629-8372, 48 hours in advance so arrangements can be made.

APPEALS

Any person who decides to appeal any decision of the Ocala General Employees Retirement Fund Board of Trustees with respect to any matter considered at this meeting will need a record of the proceeding, and for such purpose, may need to ensure that a verbatim record of the proceeding is made.

Teams Meeting Link: [https https://bit.ly/3UJgcIJ](https://bit.ly/3UJgcIJ)

Meeting ID: 266 991 555 35

Passcode: KvMaAh

Download Teams | Join on the web

Or call in (audio only)

+1 352-448-0342,,990023901# United States, Gainesville

Phone Conference ID: 990 023 901#

1. Call To Order & Attendance
 2. Public Noticed & Public Comments
 3. Attorney Report
 - 3a. [1099 R Reporting Disability Changes](#)
Attachments: [1099R reporting of disability income Memo \(00256214xBC171\)](#)
 4. Consultant Report - Segal
 - 4a. [Quarterly Investment Report March 31, 2024](#)
Attachments: [City of Ocala Q1 2024](#)
 - 4b. [Private Credit Search 5.2024](#)
Attachments: [City of Ocala General ERS PC Search May 2024](#)
 5. Minutes
 - 5a. [General Pension Board Minutes - February 12, 2024](#)
 6. Other Items For Discussion
- Adjournment