



## Ocala Investment Committee Agenda - Final Tuesday, February 4, 2025

### Meeting Information

*Location*

CSO Conference Room  
201 SE 3rd St  
Ocala, FL 34471

*Time*

9:00 AM

Jay A. Musleh  
City Councilman

Peter Lee  
City Manager

Janice Mitchell  
Chief Financial Officer

Tammi Haslam  
Director of Budget  
Budget Department

Marcella Hughes  
Accounting Manager  
Finance Department

Peter Brill  
Director of Finance and Customer Service  
Finance Department

### 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 (352) 629-8229, 48 hours in advance so arrangements can be made.

### APPEALS

Any person who decides to appeal any decision of the Ocala City Council 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.

1. **Call To Order**
2. **Introduction**
  - [Formal Introductions for Board Members](#)
3. **Minutes Approval**
  - [Minutes Approval](#)
4. **Reports**
  - a [Sawgrass Asset Management](#)
  - b [Seix Investment Advisors](#)
  - c [PFM Asset Management](#)
  - d [CapTrust Asset Management](#)
5. **Overview - Internal Investment Report**
  - [Internal Investment Report](#)
6. **Other Matters**
7. **Adjournment**