



Ocala General Employees' Retirement Fund Board of Trustees Agenda - Final Monday, August 10, 2026

Meeting Information

Location

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

Time

9:00 AM

Trustees

Lyn Cole
Trustee

Anthony Ortiz
Trustee

Arnie Hersh
Trustee

Charlie Varney
Trustee

Hope Maynard
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 Karen Czechowicz at (352) 629-8229, 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: : <https://bit.ly/3WaUixM>

Meeting ID: 289 268 683 358

Passcode: TL2un96A

Dial in by phone +1 352-448-0342,,259277887#

Find a local number: <https://dialin.teams.microsoft.com/bed17a9a-7252-46bd-a089-e685594afc9f?id=259277887>

Phone Conference ID: 259 277 887#

1. Call To Order & Attendance

[Agenda & Public Notice](#)

2. Public Comment

Email Public Comments during the Meeting to: Ocala@ResourceCenters.com

3. Approval of Minutes

a. [Minutes May 10, 2026](#)

b. [Minutes May 26, 2026](#)

c. [Minutes June 29, 2026](#)

4. Reports

a. [Investment Advisors Q2 2026 Performance Report](#)

b. Board Counsel (Bonni Jensen, Klausner Kaufman Jensen & Levinson)

1. [2026 Summary Plan Description](#)

2. [RMLO](#)

3. [2027 Meeting Dates](#)

c. Administrator Report (Scott Baur, Resource Centers)

1. [Transition & Borad Updates](#)

2. [Signature Authorization Updates](#)

3. [Conferences & Educational Opportunities](#)

4. [Resource Centers Service Team & Contacts](#)

5. Benefit Approvals

6. Plan Financials

- a. [Interim Financial Statement](#)
 - b. [Approval Expenses](#)
- 7. **Other Business**
- 8. **Adjournment**