



Ocala General Employees' Retirement Fund Board of Trustees Agenda - Final Monday, August 11, 2025

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

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://bit.ly/3ZAUjxG>

Meeting ID: 212 307 025 287

Passcode: sTJBhd

Dial in by phone

+1 352-448-0342,,192167582# United States, Gainesville

Find a local number

Phone conference ID: 192 167 582#

1. Call To Order & Roll Call
2. Public Notice & Public Comments
3. Trustee Nomination & Appointment
 - 3a. [Trustee Results](#)
Attachments: [Trustee Nomination Summary 5.25](#)
4. Actuary Valuation Report & Mortality Update
 - 4a. [October 2024 Actuarial Valuation & Mortality Memo](#)
Attachments: [Ocala General 2024 Actuarial Valuation 2025.04.14 FRS mortality Memo](#)
5. Attorney Report
 - 5a. [Form 1, Boycott & Supreme Court Ruling in Stanley v. City of Sanford](#)
Attachments: [Memo regarding 2025 online Form 1 Filing - 4912-2111-0580.1](#)
[2025 Memo re Boycott Israel List](#)
[2025 Memo re Stanley v. City of Sanford](#)
6. Consultant Report - Segal
 - 6a. [Portfolio Performance March 30, 2025, Portfolio Performance June 30, 2025, Wellington Update & Churchill Organization Update](#)
Attachments: [City of Ocala Q2 2025](#)
[City of Ocala Q1 2025](#)
[WTC-CIF Opportunistic Investment Allocation Liquidating SOC - 9956](#)
[Notice of Organizational Changes Churchill](#)
7. Minutes
 - 7a. [General Pension Board Minutes 2.12.25](#)
Attachments: [General Pension Board Minutes 2.10.25](#)

8. Other Items For Discussion

8a. [DB, Term. Yrs of Service Calculation](#)

Attachments: [DB, Term, 401 Yrs of Service Summary](#)
[2025.05.02 Ocala General VT Normal Final Redacted](#)

8b. Next Year Meeting Dates

9 Adjournment