



**CITY OF SAN CLEMENTE
INVESTMENT ADVISORY COMMITTEE
REGULAR MEETING**

July 24, 2023

5:30 P.M.

**Community Conference Room
910 Calle Negocio, San Clemente**

AGENDA

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| 1. Roll Call | Charlie Smith |
| 2. Approval of Minutes – May 1, 2023 | Charlie Smith |
| 3. Investment Report – 4 th Quarter FY 2022-23 | Charlie Smith |
| 4. Discuss portfolio allocation, current economic environment
and other related topics. | Charlie Smith |
| 5. Public Input | |
| 6. Adjournment | |

The next Regular Meeting of the Investment Advisory Committee will be held on October 23, 2023 at 5:30 p.m. in the Community Conference Room, located at City Hall, 910 Calle Negocio, San Clemente, California.

Attachments: Minutes of May 1, 2023
Investment Report, 4th Quarter 2022-23

Members: Charlie Smith, City Treasurer, Chair
Victor Cabral, City Council Member
Art Carter, Citizen Representative
Amanda Conley, Citizen Representative
Jeff Willardson, Industry Specialist

Staff: Sandee Chiswick, Senior Accountant
Melissa Anderson, Office Specialist

Chandler Asset
Management Jayson Schmitt

Pursuant to the Americans with Disabilities Act, persons with a disability who require a disability-related modification or accommodation in order to participate in a meeting, including auxiliary aids or services, may request such a modification from the Finance & Administrative Services Department at 949-361-8360. Notification 48 hours prior to the meeting will enable the City to make reasonable arrangements to assure accessibility to the meeting. Written material distributed to the Investment Advisory Committee after the original agenda packet was distributed is available for public inspection in the City Clerk's Office, located at 910 Calle Negocio, San Clemente, during normal business hours.