

**Trustees of the Trust Funds  
Town of Bedford, NH  
24 North Amherst Road  
Bedford, NH 03110**

Notice of Meeting:

28 Aug 2023

There will be a meeting of the Trustees of the Trust Funds on Friday, 01 Sep 2023 at 1:30 PM in the Conference Room, Bedford Town Office Building, 24 North Amherst Road, Bedford, NH.

Anyone with a disability or special needs who would like to attend this meeting should notify the Bedford Town Manager at (603) 792-1300.

**AGENDA:**

1. Roll Call
2. Approval of minutes of 13 & 26 Apr 2023 meetings.
3. Old Business:
  - a. Trustee Peterson: follow up on counseling financial advisors against purchasing a security outside of the “window” stated in the Investment Policy.
  - b. Trustee Cheetham letter from Attorney Quinlan of the inability of changing existing private Trusts directive(s)
4. New Business:
  - a. Review Trustees’ Annual Schedule
  - b. Quarterly investment review with Clarfeld (Citizens Bank) investment advisors.
5. Trustees’ Comments
6. Adjournment