

Finance and Investment Committee Agenda

August 22, 2024 @ 10:00 AM

Call to Order - Jeff Ricci

Public Comment

Old Business

Approval of Finance and Investment Committee Minutes - May 16, 2024

Draft 2024-05-16 F+I Minutes.pdf

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New Business

Beacon Pointe

Macro Market Review

Quarterly Investment Update

Benchmark Update Proposal (bonds % in IPS p.3)

Guest: ESG Boston Common (since 2017 - performance review)

Rebalance ESG portfolio proposal

Campaign Reserve Request

State of California / CSU / SJSU budget update - Charlie Faas

Next Meeting - November 14, 2024 @ 10:00 AM

Adjournment

Attachments

01 Q224 Exec Summary.pdf

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03 2Q24 Tower ESG Rebalance Recommendation.pdf

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Tower Foundation IPS - Approved 2024-05-16.pdf

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