



TOWN OF BRIDGEWATER CONNECTICUT

P.O. Box 216, 44 Main Street South, Bridgewater CT 06752

AGENDA

Tuesday, April 24, 2018

Town Hall: 7:00PM

- 1. Approval of Minutes of January 11th, 2018 meeting**
- 2. Portfolio reviews and investment changes/recommendations:**

Scholarship Funds

- **Bridgewater Scholarship Fund**
- **Jespersen Scholarship Fund**
- **Gould Fund**
- **Margaret Ford Fund**

Other Funds

- **Richard T. Harris Fund**
- **Burnham Fund**
- **Land Acquisition Fund**
- **Bridgewater Library Fund**

1. Old Business

Movement of The Harris Fund and The Land Acquisition Fund which are invested in mutual funds. Per our auditor and the town attorney they need to be moved out.

2. New Business-

Dorothy Gustafson donation to the Bridgewater Scholarship Fund in the amount of \$250,000.00 the funds have been deposited by Ameriprise as cash

Suggested Investment Breakdowns

\$26k to MFS Value

\$40k to MFS International Value

\$70k to MFS Total Return Bond

\$70k to MFS Corporate Bond

\$44k to MFS Government Securities

3. Adjourn