FUNDS COMMISSION AGENDA

November 16, 2026
12:00 PM
In-Person Meeting
San Diego Central Library
The Kathy and Dan Sullivan Library Commission Room, 9th Floor
330 Park Boulevard
San Diego, CA 92101
The meeting will be recorded and available for viewing on the City's PublicMeetings YouTube channel located HERE
San Diego, CA

For information, contact Peggy Rodriguez, Office of Boards and Commissions Liaison
Email: rodriguezp@sandiego.gov
Phone: (619) 236-7134

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Agenda Item Public Comment – In lieu of in-person attendance, members of the public may submit their comments using the webform. If using the webform, indicate the agenda item number you wish to submit a comment for. Instructions for word limitations and deadlines are noted on the webform. On the webform, members of the public should select Funds Commission. DISCLAIMER: Please note that comments and information provided via this form are public record submitted by members of the public. Additionally, these comments are posted as submitted. The Funds Commission will make no attempt to identify or remove duplicates to avoid removing corrections or supplemental comments. The City may refuse to display comments or information if it includes obscenity, defamation, fraud, incitement, speech integral to criminal conduct, and child pornography.

ROLL CALL

APPROVAL OF MINUTES

August 25, 2026

INFORMATIONAL ITEMS - The following items are informational only. No action will be taken by the Commission:

I. Report from Northern Trust Regarding Mt. Hope Cemetery Fund Investment and Performance Review – Peter Stutz

II. Report from Segal Marco Advisors Regarding Business and Economic Outlook – Steven Cottle

III. Report from Segal Marco Advisors Regarding the Performance of the following Funds – Steven Cottle

a. Edwin A. Benjamin Memorial Fund
b. Jane Cameron La Jolla Library Fund
c. Phillip L. Green Memorial Fund
d. Los Penasquitos Canyon Preserve Fund
e. Gladys Edna Peters Memorial Fund
f. Effie E. Sergeant Memorial Fund

IV. Effie Sergeant Memorial Fund's one time distribution of $30,000.00 – Elizabeth Correia

ACTION ITEMS

I. Rebalancing Recommendation from Segal Marco Advisors – Steven Cottle

COMMENTS FROM COMMISSIONERS, STAFF

NON-AGENDA PUBLIC COMMENT

This portion of the agenda provides an opportunity for members of the public to address the Commission on items of interest within the jurisdiction of the Commission.Comments are limited to three (3) minutes and are non-debatable. To exercise this right, members of the public must submit a Public Comment Request form prior to themeeting. At the conclusion of the comment, the Commission Chair has the discretion to determine appropriate disposition of the matter. Pursuant to open meeting laws, nodiscussion or action, other than a referral, shall be taken by the Commission on any issue brought forth under Non-Agenda Public Comment.

SCHEDULING OF NEXT MEETING

ADJOURNMENT