DEFINED CONTRIBUTION PLANS TRUSTEE MEETING SUMMARY

Friday, September 18, 2026

The Defined Contribution Plans Trustee Board of the City of San Diego held its regularly scheduled meeting on Friday, September 18, 2026. The meeting was conducted in person at the City Administration Building; 202 C Street, San Diego, CA 92101. The meeting was called to order at 1:32 p.m. by Carina Coleman.

1. ACTION ITEMS

A. Roll Call

Trustees Present: Angela Colton, Carina Coleman, Elizabeth Correia, Gregg Rademacher, Stanley Martinez

Trustees Absent:

Staff present: Quennelle Allen, Tom Brady

B. Interview Finalists for Investment Consultant Services Contract

Segal Marco Presenters: Steven Cottle, David Roll, Rick Reed, Rosemary Guillette

Morgan Stanley Presenters: Ted Grigsby, Ericka Scalevin, Tom Braeden

Scoring and Selection of Investment Consultant

Final Scoring:

Segal Marco - 83.65 Points

Morgan Stanley - 88.50 Points

MOTION TO APPROVE SELECTING MORGAN STANLEY: Greg Rademacher
SECOND: Stanley Martinez

PASS (5-0)

2. COMMENTS FROM TRUSTEES, STAFF, ADMINISTRATOR, ATTORNEY

3. PUBLIC COMMENT

4. NEXT MEETING

Wednesday, November 4, 2026

5. **ADJOURNMENT**

Meeting adjourned at 4:27 pm

Backup documentation is available from the Risk Management Department