



Finance Committee Meeting  
Wednesday, March 31, 2021 ❖ 9:20 – 11:30 AM

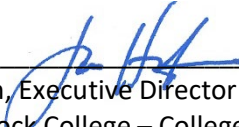
Meeting to be held remotely

In response to the coronavirus pandemic, the Governor has issued Executive Order modifying the Brown Act in order to facilitate essential public meetings being held through remote methods, such as telephonically or electronically. Directors and staff will attend via video conference. The meeting will be conducted via Zoom. The meeting ID <https://hancockcollege.zoom.us/j/95547258342>

*Please note the meeting may be recorded for future viewing.*

**AGENDA**

	Page	Tentative Time
1. Call to Order		9:20 AM
2. Roll Call		9:21
3. Public Comment		
<i>This section of the agenda is intended for members of the public to address the Executive Committee on items involving the Foundation that are being considered in Open Session. Please note that Directors are prohibited by the Brown Act from responding to comments made regarding topics not on the official agenda. If you wish to speak to any item listed, please complete a Request to Speak Card available from the Executive Director. It is suggested that speakers limit themselves to 5 minutes.</i>		
4. Approval of Agenda for March 31, 2021 (ACTION)		9:23
5. Santa Barbara Foundation, Investment Review – Ms. Andrea Light, Ms. Wendy Trimble		9:30
6. Northern Trust, Investment Review – Mr. Louis Piscane		9:50
7. Morgan Stanley, Investment Review – Mr. Eddie Murray, Ms. Jennifer Murray		10:10
8. Monarch Wealth Mgmt., Investment Review – Mr. Aaron Clark		10:30
9. Mechanics Wealth Mgmt., Investment Review – Mr. Todd McGinley, Mr. Paul Tozzi		10:50
10. Adjournment – ACTION		11:15
11. Next Meeting – April 7, 2021, 2:00 – 3:30 PM, via Zoom		

  
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Jon Hooten, Executive Director  
Allan Hancock College – College Advancement

Finance Committee Members:

- |                      |                          |  |
|----------------------|--------------------------|--|
| Glenn Owen, Chair    | Lee-Volker Cox, Director | Peggy Hesse, Director                          |
| Jim Fields, Director | Judy Frost, Director     | Eric Smith, AHC Vice President, Finance & Admi |

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*The mission of the Allan Hancock College Foundation is to operate for the advancement of education by raising funds and building community support to meet the needs of the college in the areas of scholarships, capital/infrastructure projects and program support.*