



## **AGENDA**

**Investments Committee**  
**Wednesday, April 23, 2025**  
**9:00am – 10:30am MST**  
**West Center Room 2 / Zoom**

GVR's Mission Statement: "To provide excellent facilities and services that create opportunities for recreation, social activities, and leisure education to enhance the quality of our members' lives."

**Committee:** Lanny Smith (Chair), Michael Cataldo, Dale Howard, Bev Lawless, George Losleben, Tony Morley, Bob Quast, Eric Sullwold, Steve Wilhelm, Kathi Bachelor (President), Scott Somers (CEO), David Webster (CFO/Liaison)

### **Agenda Topic**

1. **Call to Order / Roll Call - Establish Quorum**
2. **Approve or Amend Agenda**
3. **Chair Comments**
4. **Business**
  - A. Review of Operating Cash Investments with Kevin Palevsky of JPM
  - B. Review of 2024 1<sup>st</sup> Quarter with John Roberts of Corient
5. **Member Comments**
6. **Adjournment**

**Next Meeting:** Wednesday, July 16, 2025, 9:00-10:30am, WC-Rm 2/Zoom