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**AGENDA**

**Sheriff's Office Retirement Plan (SORP) Board**

**Thursday, April 21, 2021 - Time: 1:00 pm**

**Location: Chesapeake Building, 41770 Baldrige Street, Leonardtown, MD**

Public meetings are now open to the public as long as social distancing guidelines can be maintained and the Commissioners' Meeting Room capacity limits do not exceed 32. Everyone in attendance must adhere to the social distancing guidelines and wear a mask at all times except when speaking, consuming food/drink or have a disability. If social distancing guidelines or occupancy room capacity limits cannot be followed, the meeting may be rescheduled. Citizens may listen to the meeting by calling 301-579-7236; access code: 963443#. The public is strongly encouraged to view the meeting remotely on Channel 95 and YouTube. For additional information please contact

Karen Gates at [karen.gates@stmarysmd.com](mailto:karen.gates@stmarysmd.com)

**1. Call to Order (R. Bridgett)**

**2. Roll Call (R. Bridgett)**

- A. Approval of the April 21, 2021 Meeting Agenda
- B. Approval of the March 25, 2021 Meeting Minutes

**3. New Business**

- A. Morningstar Plan Investment Ratings (J. Walters)
- B. Patrick Wing, Marquette Associates
  - 1. Recommendations
  - 2. Alternatives Discussion
  - 3. Asset Allocation
  - 4. Next Steps
- C. Wells Fargo / Principal Transition (C. Pratson)
- D. Disability Application (C. Pratson)

**4. Committee Reports (C. Pratson)**

- A. Administrator's Report

**5. Public Comments (R. Bridgett)**

**6. Closed Session (R. Bridgett)**

- A. Legal Advice

**7. Adjourn (R. Bridgett)**

Distribution to Board of Trustee Members:

Dr. Rebecca Bridgett, County Administrator  
Jeannett Cudmore, Chief Financial Officer  
Sgt. Shawn Moses, Sheriff's Office Representative  
Sgt. Clay Safford, Sheriff's Office Representative

Others:

Catherine Pratson, Plan Administrator  
Karen Gates, Plan Coordinator

John Walters, Citizen Member