



**Retirement Plan A Meeting Agenda
Tuesday, October 14, 2025, 10:00 AM
Administration Building, The Station
300 Henry Ward Way, 1st Floor
Chairman or Vice Chairman Presides**

UPDATES

- Seyfarth Shaw LLP Jason Justice
- RFP Jason Justice

NEW BUSINESS

- 2026 RPA Meeting Calendar LaDana Bruce

EXECUTIVE SESSION

REPORTS

- New Benefits Report LaDana Bruce
- Distribution Report LaDana Bruce

REGULAR BUSINESS

- Minutes from 8/12/2025 LaDana Bruce
- Minutes from 8/12/2025 - Executive Session LaDana Bruce

ADJOURNMENT

Final:



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

Item Created: October 10, 2025
Date Submitted: October 10, 2025
Final Approval Date: October 13, 2025
Presenter: Jason Justice, Engineering Project & Asset Manager
Item of Business: Seyfarth Shaw LLP
Meeting Date: October 14, 2025

Purpose of Request:
Status update for Seyfarth Shaw transfer.

Facts & Issues / History & Background:
[AGENDA_ITEM_CUSTOM_TEXT_3]

Department Recommendation:
[AGENDA_ITEM_CUSTOM_TEXT_4]

Department Director:
Jason Justice

If funding is involved, are funds approved within the current budget? No

Amount Requested: Sources of Funds:

Finance Comments:

Administrative Comments:
[AGENDA_ITEM_CUSTOM_TEXT_6]

Attachments:
1. City of Gainesville - File Transfer Letter(18523323.2)

June 17, 2025

VIA EMAIL(fileroom@mmmlaw.com)

Morris Manning & Martin, LLP
1600 Atlanta Financial Center
3343 Peachtree Road, N.E.
Atlanta, Georgia 30326
Attn: William Dalton, Jr., Information Governance Manager

Re: Transfer of files pertaining to City of Gainesville (Client No. 20604)

Dear William:

We hereby authorize the transfer of all files for all matters handled by Ed Emerson and other Morris, Manning and Martin, LLP attorneys for City of Gainesville (Client No. 20604), including all databases, original company documentation, document production materials, docketing information, hard copy files, electronic files and emails, etc., to:

Seyfarth Shaw LLP
1075 Peachtree Street, NE
Suite 2500
Atlanta, GA 30309-3962
Attn: Ed Emerson
edemerson@seyfarth.com

Please contact Hiba Jabali at hjabali@seyfarth.com to coordinate the transfer of any files.

To facilitate an orderly and expeditious transition, we ask that you prioritize the electronic transfer of the contents of the iManage folders for each matter highlighted on Exhibit A.

Following delivery of the above, we would appreciate your assistance in coordinating the full transfer of the remaining client files, including any additional electronic documents. You may retain copies of files, but to avoid any delay and expense in making copies now, we agree and direct that upon your future request, Seyfarth Shaw LLP is to grant you reasonable access to inspect and to copy any of the materials you transfer to it pursuant to this letter.

Thank you in advance for your cooperation. Should you have any questions or anticipate any delays in transferring the files, please contact me at the email listed below.

City of Gainesville

Authorized by: Jason Justice <JJustice@gainesvillega.gov>
Title: Chair, Retirement Plan A
Email: JJustice@gainesvillega.gov

cc: Ed Emerson (edemerson@seyfarth.com)

Exhibit A

Client Number	Client Name	Matter Number	Matter Description
20604	City of Gainesville	106023	Retirement Plan A



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

Item Created: October 10, 2025
Date Submitted: October 10, 2025
Final Approval Date: October 13, 2025
Presenter: Jason Justice, Engineering Project & Asset Manager
Item of Business: RFP
Meeting Date: October 14, 2025

Purpose of Request:
Provide update on status of RFP for investment advisory services.

Facts & Issues / History & Background:
[AGENDA_ITEM_CUSTOM_TEXT_3]

Department Recommendation:
[AGENDA_ITEM_CUSTOM_TEXT_4]

Department Director:
Jason Justice

If funding is involved, are funds approved within the current budget? No

Amount Requested: Sources of Funds:

Finance Comments:

Administrative Comments:
[AGENDA_ITEM_CUSTOM_TEXT_6]

Attachments:
None



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

Item Created: October 10, 2025
Date Submitted: October 13, 2025
Final Approval Date: October 13, 2025
Presenter: LaDana Bruce, Retirement Manager
Item of Business: 2026 RPA Meeting Calendar
Meeting Date: October 14, 2025

Purpose of Request:
Present 2026 meeting calendar

Facts & Issues / History & Background:
[AGENDA_ITEM_CUSTOM_TEXT_3]

Department Recommendation:
Approve.

Department Director:
Janeann Allison

If funding is involved, are funds approved within the current budget? No

Amount Requested: Sources of Funds:

Finance Comments:

Administrative Comments:
[AGENDA_ITEM_CUSTOM_TEXT_6]

Attachments:
1. Public Notice - Meeting Calendar 2026

PUBLIC NOTICE

IN ACCORDANCE WITH THE GEORGIA OPEN MEETINGS ACT AS AMENDED, VOLUME 50, CHAPTER 14, NOTICE IS HEREBY GIVEN; **THE RETIREMENT PLAN A BOARD** WILL MEET ON **TUESDAYS** AT **10:00 A.M.** ON THE FOLLOWING DATES:

January 13, 2026
February 10, 2026
April 14, 2026
May 12, 2026
June 9, 2026
August 11, 2026
October 13, 2026
November 10, 2026
December 8, 2026

THE SCHEDULED MEETINGS WILL BE HELD IN THE **ADMINISTRATION BUILDING, STATION ROOM, 1ST FLOOR** LOCATED AT **300 HENRY WARD WAY, GAINESVILLE, GA**. PLEASE CONTACT **LADANA BRUCE, RETIRMENT MANAGER, AT 770-538-4940** FOR INFORMATION SURROUNDING THE MEETING(S).

NOTICE OF ANY SPECIAL MEETINGS AND/OR DEVIATIONS TO THE SCHEDULE SHALL BE POSTED BY PUBLIC NOTICE AT THE MEETING LOCATION AND ON THE CITY OF GAINESVILLE WEBSITE: www.gainesville.org.

Posted:

cc: Mayor and City Council
City Manager's Office
City Attorney
Department Directors
Media
City of Gainesville Website
Meeting Location Public Display Board



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

Item Created: October 10, 2025
Date Submitted: October 10, 2025
Final Approval Date: October 13, 2025
Presenter: LaDana Bruce, Retirement Manager
Item of Business: New Benefits Report
Meeting Date: October 14, 2025

Purpose of Request:
Provide current New Benefits Report.

Facts & Issues / History & Background:
[AGENDA_ITEM_CUSTOM_TEXT_3]

Department Recommendation:
Approve as presented.

Department Director:
Janeann Allison

If funding is involved, are funds approved within the current budget? No

Amount Requested: Sources of Funds:

Finance Comments:

Administrative Comments:
[AGENDA_ITEM_CUSTOM_TEXT_6]

Attachments:
1. New Benefits Report 10142025 OM

**RETIREMENT PLAN A
NEW BENEFITS PAYMENT REPORT
August-September 2025**

	RETIREE BENEFICIARY	DEPARTMENT	EFFECTIVE DATE	BENEFIT INFORMATION				SERVICE	
				TYPE	MONTHLY AMOUNT	START DATE	SPOUSAL OPTION	Years of Service	TOTAL - CREDITED (Includes Conv Sick)
1	Glasper, Paula	DWR	7/31/2025	Normal		8/1/2025	None	35.7	36.4
2	Whisnant, Tina	DWR	7/31/2025	Early		8/1/2025	None	22.9	22.9
3	Elrod, Troy	DWR	8/30/2025	Normal		9/1/2025	None	22.8	23

Monthly Total \$ 12,437.02

SPECIAL REPORTS

	RETIREE/ BENEFICIARY	DEPARTMENT	EFFECTIVE DATE	BENEFIT INFORMATION			
				TYPE	Amount	Updated Amount	SPOUSAL OPTION

Nothing to report

Monthly Total \$0.00



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

Item Created: October 10, 2025
Date Submitted: October 10, 2025
Final Approval Date: October 13, 2025
Presenter: LaDana Bruce, Retirement Manager
Item of Business: Distribution Report
Meeting Date: October 14, 2025

Purpose of Request:
Provide Board with current Distribution Report.

Facts & Issues / History & Background:
[AGENDA_ITEM_CUSTOM_TEXT_3]

Department Recommendation:
Approve as presented.

Department Director:
Janeann Allison

If funding is involved, are funds approved within the current budget? No

Amount Requested: Sources of Funds:

Finance Comments:

Administrative Comments:
[AGENDA_ITEM_CUSTOM_TEXT_6]

Attachments:
1. Distribution Report 10142025 OM

**RETIREMENT PLAN A
DISBURSEMENT OF CONTRIBUTIONS
August-September 2025**

EMPLOYEE NAME	DEPARTMENT	DATE OF HIRE	TERMINATION DATE	DISTRIBUTION INFORMATION					
				DATE PROCESSED	CONT AMT	VESTED	DEATH BENEFIT	LUMP SUM/ ROLLOVER	
1	Jones, Bradley	Admin Serv	4/1/2019	3/22/2024	8/5/2025		No	N/A	Lump Sum
2	Yawn, Zachary	DWR	08/29/2022	7/16/2025	8/5/2025		No	N/A	Lump Sum
3	Jimenez, Marlene	Admin Serv	06/10/2024	4/11/2025	8/5/2025		No	N/A	Lump Sum
4	Chastain, Joseph	PD	06/05/2017	6/2/2025	8/15/2025		No	N/A	Rollover
5	Rocho, Logan	DWR	05/30/2023	7/3/2025	8/18/2025		No	N/A	Lump Sum
6	DeLong, Ernest	PD	01/09/2023	6/13/2025	8/18/2025		No	N/A	Rollover
7	Washburn, Jennifer	Admin Serv	04/03/2023	11/8/2023	9/4/2025		No	N/A	Lump Sum
8	DeVasto, Vincent	PD	06/17/2019	4/7/2022	9/4/2025		No	N/A	Lump Sum
9	Peacock, Chadwick	FD	03/04/2024	8/7/2025	9/18/2025		No	N/A	Lump Sum
10	Montes, Ana	MC	08/30/2021	9/5/2025	9/30/2025		No	N/A	Lump Sum

Total \$194,265.19

SPECIAL REPORTS								
RETIREE/ BENEFICIARY	DEPARTMENT	EFFECTIVE DATE	BENEFIT INFORMATION				SERVICE	
			TYPE	Amount	PROCESSED	SPOUSAL OPTION	TOTAL	CREDITED

Nothing to Report



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

Item Created: October 10, 2025
Date Submitted: October 10, 2025
Final Approval Date: October 13, 2025
Presenter: LaDana Bruce, Retirement Manager
Item of Business: Minutes from 8/12/2025
Meeting Date: October 14, 2025

Purpose of Request:
Present the minutes from 8/12/2025 RPA meeting.

Facts & Issues / History & Background:
[AGENDA_ITEM_CUSTOM_TEXT_3]

Department Recommendation:
Approve as presented.

Department Director:
Janeann Allison

If funding is involved, are funds approved within the current budget? No

Amount Requested: Sources of Funds:

Finance Comments:

Administrative Comments:
[AGENDA_ITEM_CUSTOM_TEXT_6]

Attachments:
1. RPA Minutes 08122025

BOARD MEMBERS PRESENT: Jason Justice, Corey Jones, Jordan Green, Alisa Garyson, Melissa Biggers, Ricky Rich, Kristen Watson via Zoom
EX-OFFICIO MEMBERS ABSENT: Janeann Allison, Bryan Lackey, Jeremy Perry
OTHERS PRESENT: LaDana Bruce, Jeff Swanson

Chairman Jason Justice served as the presiding officer and called the meeting to order at 10:06 A.M.

NEW BUSINESS:

Swearing in of Retiree Representative Rich

Board Member Alisa Grayson, City Clerk, administered the Oath of Office to Mr. Ricky Rich.

Mariner Institutional, LLC

Mr. Jeff Swanson, discussed the acquisition of Southeastern Advisory Services, SEAS, to Mariner Institutional LLC. To maintain continuity, Mariner has consented to honor our current contract with SEAS and Mr. Swanson's management of our investments. Mr. Swanson presented an agreement "Consent for Assignment of Investment Advisory Agreement", for the board's approval.

Motion to accept agreement as presented

Motion made by Vice-Chairman Jordan Green
Motion seconded by Board Member Melissa Green

Votes favoring the motion: Green, Jones, Justice, Grayson, Biggers, Watson, Rich

PRESENTATIONS:

SEAS Quarterly Performance Report

Mr. Swanson presented the quarterly report. He emphasized remaining conservative moving forward. Per Vice-Chairman Jordan Green's request

EXECUTIVE SESSION:

Motion to close the meeting to enter an Executive Session to discuss personnel matters at 10:52 A.M.

Motion made by Vice-Chairman Jordan Green
Motion seconded by Board Member Alisa Grayson

Votes favoring the motion: Green, Jones, Justice, Grayson, Biggers, Watson, Rich

BOARD MEMBERS PRESENT: Jason Justice, Corey Jones, Jordan Green, Alisa Garyson, Melissa Biggers, Ricky Rich, Kristen Watson via Zoom
EX-OFFICIO MEMBERS ABSENT: Janeann Allison, Bryan Lackey, Jeremy Perry
OTHERS PRESENT: LaDana Bruce

Motion to close the Executive Session and to continue the meeting at 10:54 A.M.

Motion made by Vice-Chairman Jordan Green
Motion seconded by Board Member Corey Jones

Votes favoring the motion: Green, Jones, Justice, Grayson, Biggers, Watson, Rich

REPORTS:

Distribution Report

Secretary LaDana Bruce presented the Distribution Report for June-July 2025 totaling \$8,682.64

Motion to approve report as presented.

Motion made by Board Member Alisa Grayson

Motion seconded by Board Member Melissa Biggers

Votes favoring the motion: Jones, Biggers, Green, Justice, Grayson, Rich, Watson

New Benefit Report

Secretary LaDana Bruce presented the New Benefit Report for June-July 2025 with one new retiree.

Motion to approve report as presented.

Motion made by Board Member Alisa Grayson

Motion seconded by Board Member Kristen Watson

Votes favoring the motion: Jones, Biggers, Green, Justice, Grayson, Watson, Rich

UPDATES:

Salem Trust Retiree Portal

Secretary LaDana Bruce reported that the Salem Trust Portal is now up and running and available, though not required, for all Plan A retirees.

Seyfarth Shaw LLP

Chairman Jason Justice reported that he had not been able to contact Ed Emerson to discuss and no action has been taken.

REGULAR BUSINESS

Minutes for June 19, 2025

Motion to approve minutes with minor correction

Motion made by Board Member Corey Jones

Motion seconded by Vice-Chairman Jordan Green

Votes favoring the motion: Jones, Biggers, Justice, Grayson, Green, Rich

Abstained due to absence from 6/19/2025 Meeting: Watson

Executive Session Minutes for June 19, 2025

Motion to approve minutes minor correction

Motion made by Board Member Alisa Grayson

Motion seconded by Board Member Melissa Biggers

Votes favoring the motion: Jones, Biggers, Justice, Grayson, Green, Rich

Abstained due to absence from 6/19/2025 Meeting: Watson

Election of Officers for FY 2026

Motion to re-elect Chairman Jason Justice.

Motion made by Board Member Alisa Grayson

Motion seconded by Board Member Ricky Rich

Votes favoring the motion: Jones, Biggers, Green, Justice, Grayson, Rich, Watson

Motion to re-elect Vice-Chairman Jordan Green.

Motion made by Board Member Alisa Grayson

Motion seconded by Board Member Melissa Biggers

Votes favoring the motion: Jones, Biggers, Green, Justice, Grayson, Rich, Watson

ADJOURNMENT: 11:07 A.M.

/lb

Jason Justice, Chairman

LaDana Bruce, Secretary to the Board



CITY OF GAINESVILLE

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Meeting Date: October 14, 2025

Purpose of Request:
Present the minutes from 8/12/2025 RPA meeting - executive session.

Facts & Issues / History & Background:
[AGENDA_ITEM_CUSTOM_TEXT_3]

Department Recommendation:
Approve as presented.

Department Director:
Janeann Allison

If funding is involved, are funds approved within the current budget? No

Amount Requested: Sources of Funds:

Finance Comments:

Administrative Comments:
[AGENDA_ITEM_CUSTOM_TEXT_6]

Attachments:
1. RPA ES Minutes 08122025

BOARD MEMBERS PRESENT: Jason Justice, Corey Jones, Jordan Green, Alisa Garyson, Melissa Biggers, Ricky Rich, Kristen Watson via Zoom
EX-OFFICIO MEMBERS ABSENT: Janeann Allison, Bryan Lackey, Jeremy Perry
OTHERS PRESENT: LaDana Bruce

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New Benefits Report

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Motion made by Vice-Chairman Jordan Green
Motion seconded by Board Member Corey Jones
Votes favoring the motion: Green, Jones, Justice, Grayson, Biggers, Watson, Rich

ADJOURNMENT: 10:54 A.M.

/lb

Jason Justice, Chairman

LaDana Bruce, Secretary to the Board