



CONNECTICUT HIGHER EDUCATION TRUST (CHET) ADVISORY COMMITTEE MEETING

Monday, December 7, 2020, 11:00 A.M. – 12:30 P.M.
Zoom Meeting / Public Webinar

AGENDA

- 1) Call to Order: Treasurer Shawn T. Wooden
- 2) Welcome Remarks and Introductions
- 3) Approval of the Minutes of the Meeting of Friday, April 12, 2019
- 4) Presentation by the Office of the Treasurer regarding 2020 Highlights and Selection of Fidelity Investments for CHET Direct and Advisor plans
 - **Laurie Martin**, Chief Investment Officer
 - **Raynald Leveque**, Deputy Chief Investment Officer
- 5) Presentation by Fidelity Investments concerning the CHET Direct & Advisor Plans
 - **Melissa Ridolfi**, Vice President, Retirement & College Savings Leadership
 - **Ron Hazel**, Senior Director, Retirement & College Savings Leadership – Advisor Plan
 - **Justin Rozzero**, Director, Retirement & College Savings Leadership – Direct Plan
 - **Sharon Rogers**, Director, Segment Marketing – Direct Plan
 - **Andrew O'Connell**, Vice President, Marketing – Advisor Plan
 - **Pamela Everhart**, Head of Regional Public Affairs
 - **Eric Kaplan**, Head of Target Date and 529 Products
 - **Heather Zakian**, Institutional Portfolio Manager
 - **Dan Terio**, Vice President, Asset Allocation Investment Product
 - **Jessica Bialas**, Director, 529 Investment Product
- 6) Establish Date for 2021 Annual Meeting
- 7) Other Business
- 8) Adjournment