



RETIREE LIAISON REPORT

NOVEMBER 2020 BOARD MEETING

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The Fund's Board of Trustees met via Zoom on November 19, 2020. Eric Mann, Chair of the Benefits and Operations Committee, gave an inspiring invocation on thankfulness. The invocation was heartfelt and set the right tone for the day's deliberations.

Eric's comments addressed the need to be thankful for everyday action. We all can do good in our personal and professional lives as we interact with family, friends and the community at large. We also should be thankful for our memories of those who influenced our lives for the better.

Finally, he encouraged everyone to be thankful for the gifts each of us has in our lives and, where and when possible, to share what we can with those less fortunate.

RECOGNITION OF TRUSTEE SERVICE

D. Scott Luttrell, former Chair of the Fund's Investment Committee, is departing from the Board of Trustees. Scott leads his own investment firm in Dallas and served two 4-year terms on the Board. He had a significant Y volunteer career, having served on the Board of Tampa Metropolitan Area YMCA.

Scott's passion for the Y always kept him centered as a champion for ensuring every act of the Fund's Board contributed to making certain the Fund provided a great benefit for YMCA Fund participants.

Scott's investment acumen ensured the Fund's ongoing sustainability for the long-term. In keeping with his strong sense of his Christian ministry and service, he shared how much he appreciated his fellow Trustees and the privilege of serving Fund constituents.

Eric Mann, President & CEO at YMCA of Florida's First Coast, completed three 4-year terms serving on the Fund's Board of Trustees. He will also depart from the Board at the end of the year.

I have known Eric for well over 20 years and I can say without equivocation that he is a consummate Y professional having served as a Fund Trustee with intelligence, commitment and sincere engagement. His service to the Fund was both greatly appreciated and valued by his fellow Trustees.

Eric and Scott have been terrific Trustees and through their service, they helped the Fund fulfill its mission for its many stakeholders.

TRUSTEES WELCOME NEW CHIEF FINANCIAL OFFICER

Michael B. Cefole, joined the Fund's senior leadership team in October as the Chief Financial Officer. Prior to his coming to the Fund, he held a number of high level executive positions with Everest Advisory Partners, Guardian Life Insurance Company of America, Hartford Life Insurance Company and Ernst and Young audit services. As a result, he brings deep knowledge and valuable experience to the Fund.

THE 29th HAROLD C. SMITH FUNDRAISER

This year, the Harold C. Smith Fundraiser has been reimagined. Proceeds from this campaign will provide support to the work of the Armed Services YMCA and YMCA World Service.

Please visit www.yretirement.org/fundraiser to learn more about these organizations, their impact, and the history behind the Smith Fundraiser.

HELP FOR RETIREES

The Fund wants you to know that its Retiree Emergency Assistance Program provides grants to help Y retirees in financial crisis, resulting from medical challenges and natural catastrophes. Each grant is for a maximum of \$2,500. Recipients are eligible for one grant per year and a maximum of two grants in a lifetime. Applications and grant criteria can be found at www.yretirement.org or requested via email at REAP@ymcaret.org.

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