



City of Margate

5790 Margate Boulevard
Margate, FL 33063
954-972-6454
www.margatefl.com

Summary Agenda - Final Employee Benefits Trust Fund

Jacqueline Chin-Kidd, Chair
Michael A. Jones, Vice Chair
Ronald N. Gangoo, Secretary
Alberto Arango, Trustee
Paul Frankenhauser, Trustee
Lori Hofer, Trustee
Joanne Simone, Trustee

Tuesday, January 14, 2025

2:30 PM

Commission Chambers

CALL TO ORDER

ROLL CALL

1) PUBLIC DISCUSSION

2) PRESENTATION

- A. [ID 2024-415](#) FINANCIAL STATEMENTS FROM KABAT, SCHERTZER, DE LA TORRE, TARABOULOS & CO. (KSDT)
- B. [ID 2024-417](#) INVESTMENT MANAGEMENT PERFORMANCE UPDATE FROM GRAYSTONE CONSULTING

3) SCHEDULE NEXT MEETING

4) APPROVAL OF BENEFITS

- A. [ID 2025-002](#) MOTION - APPROVAL OF APPLICANTS
- B. [ID 2025-004](#) MOTION - APPROVAL OF DEATH BENEFITS

5) INVOICES

- A. [ID 2024-416](#) INVOICES PROCESSED SINCE THE LAST EBTF MEETING

Attachments: [JAN 2025 - ABC-MARGATE OCT-DEC BILL.pdf](#)
[JAN 2025 - Invoice_INV49466.pdf](#)
[invoice-INV50504.pdf](#)

6) DISCUSSION AND POSSIBLE ACTION

- A. [ID 2025-005](#) CONTRACT FOR PROFESSIONAL TAX & ACCOUNTING SOLUTIONS, INC.

Attachments: [Margate 2025 proposal](#)

7) REPORT FROM ATTORNEY

8) REPORT FROM TRUSTEES

9) OTHER BUSINESS

ADJOURNMENT

If a person decides to appeal any decision made by the Board with respect to any matter considered at this meeting, the person will need a record of the proceedings, and for such purpose may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. Anyone desiring a verbatim transcript shall have the responsibility, at his/her own expense, to arrange for the transcript.

Any person with a disability requiring auxiliary aids and services for this meeting may call the City Clerk's office at 954-972-6454 with their request at least two business days prior to the meeting date.

One or more members of the City Commission or City of Margate Boards may be in attendance and may participate at the meeting.