



Friday, December 12, 2025

MTRS Annual System Review and Constituents Forum 2025

Members of the Board

Iraida J. Álvarez, Esq.
Chair, Designee of the
Commissioner of Elementary
and Secondary Education

Deborah B. Goldberg
State Treasurer

Alison Eggers
Designee, Deputy General Counsel

Diana DiZoglio
State Auditor

Michael Leung-Tat
Designee, Deputy General
Counsel

Dennis J. Naughton

Jacqueline A. Gorrie

Richard L. Liston

Anne Wass

Administration

Jonathan M. Osimo
Executive Director

Scott Olsen
Assistant Executive Director &
Chief Communications Officer

Richard J. Grzembski
Assistant Executive Director &
Chief Benefits Officer

James C. O'Leary
General Counsel & Chief Legal
Officer

Surendra Puttagunta
Chief Technology Officer

Robert Fabino
Chief Human Resources &
Legal/Legislative Affairs Officer

Alison Malone
Chief Financial Officer

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Agenda

9:00 – 9:15 a.m.

Regular matters of business

Open and Executive minutes of the Regular
Meeting held on November 21, 2025

9:15 – 9:45 a.m.

PRIM Update

Michael G. Trotsky, CFA, Executive Director and
Chief Investment Officer, PRIM

9:45 – 10:00 a.m.

Update from Auditor Diana DiZoglio

10:00 – 10:45 a.m.

PERAC Update

Bill Keefe, Executive Director, PERAC

2025 MTRS Valuation

John Boorack, Actuary, PERAC

11:00 – 11:45 a.m.

Constituent Leaders Discussion

11:45 a.m. – 12:15 p.m.

MTRS December Board meeting

Applications for Ordinary Disability Retirement*

*Executive Session, Physical Condition or
Mental Health—Purpose 1*

Review and Approval of the FY25 Annual Financial Statement

Executive Director's Report

Proposed 2026 Board meeting schedule

**To be considered in Executive Session*

Via Teleconferencing Applications

Those interested in virtually attending the meeting can do so by telephone:
Conference Call Line: 1-866-817-5686, enter passcode 2139782#

Next meeting scheduled for Friday, January 30, 2026, 9:00 a.m. – 12:00 p.m.