TOWN OF WARNER

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Trustees of Trust Funds
Robert Blake
Daniel Watts
Judy Newman-Rogers

MEETING AGENDA
Trustees of Trust Funds

November 18, 2026 - Wednesday, 5:30 pm
Lower Meeting Room Warner Town Hall 5 East Main St

Join Zoom Meeting:
https://us02web.zoom.us/j/82162868200
Meeting ID: 821 6286 8200 Passcode: 1234

One tap mobile:
+19292056099,,82162868200#,,,,*1234# US (New York)
+13017158592,,82162868200#,,,,*1234# US (Washington DC)

AGENDA

1. Review the minutes of the July 27, 2026, meeting and consider approval.

2. Meeting with the investment advisory team from Bar Harbor Wealth Management – Lynne Ford, Wealth Manager; Bryan Sanford, Portfolio Manager; Kristin Lydon, Wealth Administrator.
   - Review of Bar Harbor portfolio performance for 2026 year-to-date.
   - Discussion of Town of Warner, Trustee of Trust Funds Investment Policy Statement.

3. Review year-to-date MS-9 report, and summary of expenditure requests processed year-to-date.

4. Discuss questions raised by the New Hampshire DOJ – Charitable Trust Unit relating to the Runels Fund.

5. Discuss payment of Trustee stipend.

6. Any other business

7. Public comment

8. Adjourn