

Richard A. Rainer

From: Lisa Lasky
Sent: Monday, December 20, 2021 9:08 AM
To: Richard A. Rainer
Subject: FW: GoInvest follow up

Rich,

From Jonathan. Email in support of moving forward with GovInvest.

Lisa

From: Jonathan Harris <jharris@bpwealthmgt.com>
Sent: Friday, December 17, 2021 2:27 PM
To: Lisa Lasky <llasky@portsmouthri.com>
Subject: GoInvest follow up

Hi Lisa,

I had a thorough conversation with the management team from GoInvest. I asked them several high level questions and presented a few complicated scenarios that I can anticipate the town will need pension and OPEB guidance, financial modeling and guidance particularly with the somewhat complicated arrangement moving some Fire and Police to the RI MERS Pension.

I was impressed with the whole team, they answered every question I presented and had a thorough understanding on problems the town may face in the future and a willingness to educate management and elected officials. In my opinion I think moving forward with contracting GoInvest for actuarial and financial modeling services is a worthwhile decision for the town.

Please feel free to enlist my help where you may need it.

Best Regards,
Jon Harris

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