

KIAWAH ISLAND  
**COMMUNITY**  
ASSOCIATION

THURSDAY, OCTOBER 26, 2023 AT 9 A.M.

Bobcat Hall & Virtual

## Finance Committee Meeting

### 9:00 a.m. – Regular Meeting

1. Call to Order – Lisa Mascolo
2. Approval of Meeting Minutes - Lisa M.
  - a. September 28, 2023
3. Q3 Investment Report – Cook St. / Morgan Stanley
4. Investment Policy Statement – Lisa M.
5. Review of activities since last FC meeting – BOD discussions, health & property insurance – Lisa M.
6. Q3 Financials – Dale
7. 2024 Budget – 1<sup>st</sup> Presentation – Dale/Shannon
8. Adjourn

### Next Meeting:

November 30, 2023 – 2024 Budget – Final Review

**December – No Meeting**