

**IDENTIFICATION OF CONTRACTORS & RELATED PERSONNEL**  
**2022**  
**Township of O’Hara**

Identify the Municipal Pension System(s) for which you are providing information:

Indicate all that apply with an “X”:       Non-Uniform Plan       Police Plan  
 Fire Plan

Q.1	<p>Please provide the names and titles of <b>all individuals</b> providing professional services to the <b>Requesting Municipality’s</b> pension plan(s) identified above. Also include the names and titles of <b>any advisors and subcontractors</b> of the Contractor, identifying them as such. After each name provide a description of the responsibilities of that person with regard to the professional services being provided to each designated pension plan.</p> <p><i>John Joos, Trust Advisor:</i></p> <ul style="list-style-type: none"> <li>• Provides daily contact with client regarding administration of account</li> <li>• Facilitates pension disbursements</li> <li>• Coordinates in-flows and out-flows of cash</li> <li>• Provides audit support</li> </ul> <p><i>Joyce Frydryck, Trust Manager:</i></p> <ul style="list-style-type: none"> <li>• Leadership oversight of Account Administrator including problem resolution, product development, and project management.</li> </ul> <p><i>David Harvey, Jr, Senior Investment Advisor:</i></p> <ul style="list-style-type: none"> <li>• Meets with clients to ensure their needs are being met</li> <li>• Introduces new products and services that will add value for client</li> </ul> <p><i>The following individuals provide managerial oversight of the individuals listed above:</i></p> <ul style="list-style-type: none"> <li>• Christopher Merlo, PNC Institutional Asset Management, Investment Manager</li> <li>• Deborah Kolsovsky, PNC Institutional Asset Management, Director of Investments</li> <li>• Anthony Martinelli, PNC Institutional Asset Management, Trust Director</li> </ul>
Q.2	<p>Please list the name and title of any <b>Affiliated Entity</b> and their <b>Executive-level Employee(s)</b> that require disclosure; after each name, include a brief description of their duties.</p> <p><i>PNC Capital Advisors. The individual below has managerial oversight over the services provided by PNC Bank, N.A. for the Plan:</i>  Alistair Jessiman, Chief Executive Officer of PNC Capital Advisors</p>
Q.3	<p>According to our records, no individuals named in Item 1 or Item 2 above are current or former officials or employees of the Township of O’Hara.</p>
Q.4	<p>According to our records, no individuals named in Item 1 or Item 2 above are current or former registered State or Federal lobbyists.</p>

Q.5	<p>PNC has not employed or paid compensation to a third party intermediary, agent or lobbyist to directly or indirectly communicate with any official or employee of the Township of O'Hara's Pension Plan or in connection with any transaction or investment involving PNC and the municipal pension system.</p> <p>PNC does engage legal counsel from time to time to represent it in discussions with legal counsel to the municipal pension system.</p>
Q.6	<p>According to our records, since December 17, 2009 no PNC officer, director or employee of PNC has solicited a contribution to any municipal official or candidate for municipal office in the Township of O'Hara or to the political party or political action committee of an official or candidate.</p>
Q.7	<p>According to our records, within the past two years, neither PNC nor any Affiliated Entity has made a contribution to a municipal official or candidate for municipal office in the Township of O'Hara.</p>
Q.8	<p>Neither PNC nor any Affiliated Entity has any direct financial, commercial or business relationship with any official identified on the List of Municipal Officials, of the Township of O'Hara.</p> <p>PNC may potentially have customary banking relationships (checking and savings accounts, investment accounts, loans, trust accounts, etc.) with officials identified on the "List of Municipal Officials" of the Township of O'Hara.</p>
Q.9	<p>According to our records, neither PNC nor any Affiliated Entity has given any gifts having more than a nominal value to any official listed on the "List of Municipal Officials" of the Township of O'Hara.</p>
Q.10	<p>In compliance with the provisions of Act 44, requiring the reporting of certain political contributions made within the last five years, PNC is providing the following reports:</p> <p><i>Refer to the attached report entitled <u>PA Political Contributions 2017-2021</u>. This report reflects all contributions of at least \$500 (singly or in the aggregate) made from 2017-2021 by an officer, director, Executive-Level Employee or owner of at least 5% of the firm or an Affiliate Entity to any candidates for public office or the holders of such offices in the Commonwealth and to any political committees of such candidates or office holders. Note that PNC officer is defined as designated under Regulation O of the Board of Governors of the Federal Reserve System (12 C.F.R. 215).</i></p>
Q.11	<p>According to our records, we are not aware of any apparent, potential or actual conflict of interest with respect to any officer, director or employee of PNC and officials or employees of the Township of O'Hara.</p>
Q.12	<p>Nothing additional to disclose.</p>

**VERIFICATION**

I, Joyce Frydryck, hereby state that I am a Fiduciary Manager for  
(Name) (Position)  
PNC Bank Institutional Asset Management and I am authorized to make this verification.  
(Contractor)

I hereby verify that the facts set forth in the foregoing Act 44 Disclosure Form for Entities Providing Professional Services to the Township of O’Hara’s Pension System are true and correct to the best of my knowledge, information and belief. I also understand that knowingly making material misstatements or omissions in this form could subject the responding Contractor to the penalties in Section 70S-A(e) of Act 44.

I understand that false statements herein are made subject to the penalties of 18 P.A.C.S. § 4904 relating to unsworn falsification to authorities.

*Joyce Frydryck*

\_\_\_\_\_  
Signature

*2/17/22*

\_\_\_\_\_  
Date

**PA Political Contributions (2017 - 2021) - Officer/Director/Executive Employee**

Note: PNC Officer is defined as designated under Regulation O of the Board of Governors of the Federal Reserve System (12.C.F.R.215).

- (i) *The contribution was made within the last five years.*
  - (ii) *The contribution was made by an officer, director, executive-level employee or owner of at least 5% of the person or affiliated entity.*
  - (iii) *The amount of the contribution was at least \$500 in the form of:*
    - (A) *A single contribution by a person included in subparagraph (ii).*
    - (B) *The aggregate of all contributions by all persons listed in subparagraph (ii).*
  - (iv) *The contribution was made to:*
    - (A) *A candidate for any public office in the Commonwealth or to an individual who holds that office.*
    - (B) *A political committee of a candidate for public office in the Commonwealth or of an individual who holds that office.*
- (Section 705-A. Disclosure)*

<b>Contributor Name</b>	<b>Contributor Is</b>	<b>Contributor Address</b>	<b>Date of Contribution</b>	<b>Name of Recipient</b>	<b>Recipient Is A</b>	<b>State Title Of Office</b>	<b>Amount of Contribution</b>
Gregory Jordan	Officer	601 West Drive Sewickley, PA	9/5/2017	Tom Wolf	Candidate (or Candidate's Committee) for State or Local Office	Governor	\$350
Bill S Demchak	Chairman & CEO	5564 Aylesboro Avenue Pittsburgh, PA	9/4/2018	Tom Wolf	Candidate (or Candidate's Committee) for State or Local Office	Governor	\$350
Gregory Jordan	Officer	601 West Drive Sewickley, PA	9/4/2018	Tom Wolf	Candidate (or Candidate's Committee) for State or Local Office	Governor	\$350
Gregory Jordan	Officer	601 West Drive Sewickley, PA	9/26/2017	Josh Shapiro	Candidate (or Candidate's Committee) for State or Local Office	Attorney General	\$350
Gregory Jordan	Officer	601 West Drive Sewickley, PA	10/7/2020	Josh Shapiro	Candidate (or Candidate's Committee) for State or Local Office	Attorney General	\$350
Gregory Jordan	Officer	601 West Drive Sewickley, PA	5/3/2021	Zeke Rediker	Candidate (or Candidate's Committee) for State or Local Office	Judge of the Court of Common Pleas	\$500