

Application Form

Profile

This application is used for all boards and commissions

JOHN
First Name

B.
Middle Initial

PHILLIPS
Last Name

[REDACTED]
Email Address

[REDACTED]
Home Address

Suite or Apt

Moraga
City

CA
State

94556
Postal Code

Home: [REDACTED]
Primary Phone

John B. Phillips, CPA
Employer

Owner
Job Title

Investor/consultant
Occupation

Do you, or a business in which you have a financial interest, have a contract with Contra Costa Co.?

Yes No

Is a member of your family (or step-family) employed by Contra Costa Co.?

Yes No

Interests & Experiences

Which Boards would you like to apply for?

Contra Costa County Employees Retirement Association (CCCERA)

Please describe your interest in serving as a member of the board(s) you have selected.

My interest is to continue to serve the community/county in which I live by using the actuarial, accounting and managerial skills and experience I have developed over a long professional career. If selected for a third appointed term, I believe that my background and current CCCERA Board experience, including serving as Chair for the current and prior fiscal years, will continue to allow me to remain an effective member of the Board of Retirement.

Have you previously served on a government or non-profit board or committee?

I have served as a board member of the Tau Kappa Epsilon Educational Foundation for approximately the past ten (10) years. This non-profit foundation provides scholarships for qualifying members and supports various educational and leadership programs.

Please describe how your education, work experience, or other activities have prepared you to serve on the board or commission you have selected.

My first career, spanning 31 years, was primarily spent in the employee benefits field where I practiced as a pension actuary and consultant while taking the lead role in building and leading a large actuarial and consulting practice. Consequently, I have a long standing and active interest in the design and operation of pension plans. I am a member of the American Academy of Actuaries and a CPA with an active California license. As the first CEO of a health insurance company now known as CalCPA Health (and formerly known as California CPA ProtectPlus), I established and managed its investment portfolio during my employment tenure and continue to sit on its oversight board finance committee. Finally, my undergraduate degree from the University of California, Berkeley was in finance and, together with MBAs from Cal (emphasis accounting) and Golden Gate University (taxation), my educational background is very aligned with performing the duties of a CCCERA trustee.

[CURRICULUM_VITAE_-_Phillips_2015.rtf](#)

Upload a Resume

Work History

Please provide information on your last three positions, including your current one if you are working.

1st (Most Recent)

1/1/2007 - Present

Dates (Month, Day, Year) From - To

25

Hours per Week Worked?

Volunteer Work?

Yes No

Owner/Investor/Consultant

Position Title

Employer's Name and Address

John B. Phillips, CPA [REDACTED] Moraga, CA 94556

Duties Performed

I operate a number of partnerships and trusts, invest a substantial amount of money for family and friends, serve on both local and national non-profit boards, serve as a board member for CalCPA Health and, for the last six (6) years, have served as a CCCERA board member, the last two (2) as its Chair.

2nd

10/1/1997 - 12/31/2006

Dates (Month, Day, Year) From - To

50

Hours per Week Worked?

Volunteer Work?

Yes No

Chief Executive Officer

Position Title

Employer's Name and Address

CalCPA Health (formerly California CPA ProtectPlus) 1800 Gateway Drive, Suite 201 San Mateo, CA 94404

Duties Performed

Chief Executive for a health insurance company serving the small and medium sized CPA firm community.

3rd

9/1/1966 - 9/30/1997

Dates (Month, Day, Year) From - To

50

Hours per Week Worked?

Volunteer Work?

Yes No

Regional Managing Partner

Position Title

Employer's Name and Address

PwC (formerly PricewaterhouseCoopers) San Francisco, CA

Duties Performed

West Region Managing Partner for the Human Resources Advisory Group of Coopers & Lybrand (I retired just prior to the merger of Coopers & Lybrand with Price Waterhouse), with approximately 200 employees in practice groups in Los Angeles, San Francisco and Seattle.