

Application Form

Profile

John B Phillips
First Name Middle Initial Last Name

Home Address Suite or Apt
Moraga CA 94556
City State Postal Code

Primary Phone

Email Address

Which supervisorial district do you live in?

☒ District 2

Education

Select the option that applies to your high school education *

☒ High School Diploma

College/ University A

Name of College Attended

University of California, Berkeley

Degree Type / Course of Study / Major

BS, Finance

Degree Awarded?

☒ Yes ☐ No

College/ University B

Name of College Attended

University of California, Berkeley

Degree Type / Course of Study / Major

MBA, Accounting (emphasis)

Degree Awarded?

☒ Yes ☐ No

College/ University C

Name of College Attended

Golden Gate University, SF

Degree Type / Course of Study / Major

MBA, Taxation

Degree Awarded?

☒ Yes ☐ No

Other schools / training completed:

Course Studied

Hours Completed

Certificate Awarded?

☐ Yes ☐ No

Board and Interest

Which Boards would you like to apply for?

Contra Costa County Employees Retirement Association (CCCERA): Submitted

Seat Name

Member # 9

Have you ever attended a meeting of the advisory board for which you are applying?

☒ Yes ☐ No

If you have attended, how many meetings have you attended?

All by CCCERA since May, 2011

Please explain why you would like to serve on this particular board, committee, or commission.

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 fourth appointed term, I believe that my background and current CCCERA board experience, including serving as Board Chair for the 15/16 and 16/17 fiscal years, will continue to allow me to remain an effective member of the Board of Retirement.

Qualifications and Volunteer Experience

I would like to be considered for appointment to other advisory boards for which I may be qualified.

☒ Yes ☐ No

Are you currently or have you ever been appointed to a Contra Costa County advisory board, commission, or committee?

☒ Yes ☐ No

List any volunteer or community experience, including any advisory boards on which you have served.

>Contra Costa County Board of Retirement >Contra Costa County Treasury Oversight Committee >Town of Moraga, Moraga Center Specific Plan Implementation Project, Citizens Advisory Committee

Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)

My first career, with PricewaterhouseCoopers, 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 retirement plans. I am a member of the American Academy of Actuaries and a CPA with an active California license. In my second career, as the first CEO of a health insurance company now known as CalCPA Health, I established and managed its investment portfolio, and following my retirement, continued to sit on its board as the Chair of the finance and investment 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.

Upload a Resume

Conflict of Interest and Certification

Do you have a Familial or Financial Relationship with a member of the Board of Supervisors?

☐ Yes ☒ No

If Yes, please identify the nature of the relationship:

Do you have any financial relationships with the County such as grants, contracts, or other economic relations?

☐ Yes ☒ No

If Yes, please identify the nature of the relationship:

Please Agree with the Following Statement

I certify that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and undersand that all information in this application is publicly accessible. I understand that misstatements and/or omissions of material fact may cause forfeiture of my rights to serve on a board, committee, or commission in Contra Costa County.

☒ I Agree