

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

[District Locator Tool](#)

Resident of Supervisorial District:

District 2

Self N/A
Employer Job Title

Length of Employment

N/A

Do you work in Contra Costa County?

Yes No

If Yes, in which District do you work?

District 2

How long have you lived or worked in Contra Costa County?

Over 40 years

Are you a veteran of the U.S. Armed Forces?

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 Yes, how many meetings have you attended?

All by CCCERA since May, 2011

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 Trainings & Occupational Licenses

Other Training A

Numerous training courses

Certificate Awarded for Training?

Yes No

Other Training B

Certificate Awarded for Training?

Yes No

Occupational Licenses Completed:

Certified Public Accountant and Enrolled Actuary

Qualifications and Volunteer Experience

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.

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 retired CA CPA. 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

John B Phillips

Would you like to be considered for appointment to other advisory bodies for which you may be qualified?

Yes No

Do you have any obligations that might affect your attendance at scheduled meetings?

Yes No

If Yes, please explain:

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

Yes No

If Yes, please list the Contra Costa County advisory board(s) on which you are currently serving:

CCCERA and the Treasury Oversight Committee

If Yes, please also list the Contra Costa County advisory board(s) on which you have previously served:

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

Conflict of Interest and Certification

Do you have a familial or financial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed under the "Important Information" section below or Resolution No. 2021/234)

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 relationships?

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 understand 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

Important Information

1. This application and any attachments you provide to it is a public document and is subject to the California Public Records Act (CA Government Code §6250-6270).
2. All members of appointed bodies are required to take the advisory body training provided by Contra Costa County.
3. Members of certain boards, commissions, and committees may be required to: (1) file a Statement of Economic Interest Form also known as a Form 700, and (2) complete the State Ethics Training Course as required by AB 1234.
4. Meetings may be held in various locations and some locations may not be accessible by public transportation.
5. Meeting dates and times are subject to change and may occur up to two (2) days per month.
6. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.
7. As indicated in Board Resolution 2021/234, a person will not be eligible for appointment if he/she is related to a Board of Supervisors' member in any of the following relationships:
 - (1) Mother, father, son, and daughter;
 - (2) Brother, sister, grandmother, grandfather, grandson, and granddaughter;
 - (3) Husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepson, and stepdaughter;
 - (4) Registered domestic partner, pursuant to California Family Code section 297;
 - (5) The relatives, as defined in 1 and 2 above, for a registered domestic partner;
 - (6) Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or business associate.

John B. Phillips, a brief resume

John B. Phillips has had two private sector careers, retiring as a regional managing partner with the firm now known as PricewaterhouseCoopers (PwC) in 1997 and as the CEO of a health insurance company, CalCPA Health, in 2006. He is both a retired pension actuary and CPA and now provides consulting services from his own practice. He earned both undergraduate and MBA degrees from the University of California, Berkeley and a second MBA degree in taxation from Golden Gate University. He also presently serves, or has previously served, on the boards of a variety of for-profit, not-for-profit and professional organizations, including serving as an appointed member of the Contra Costa County Employees' Retirement Association Board since 2011, which included two terms as its chairman, and the Contra Costa County Treasury Oversight Committee, for which he now serves as Chair.