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SUPERIOR COURT OF THE STATE OF CALIFORNIA  
COUNTY OF ALAMEDA

Wendell G. Moen, et al.,

Petitioners,

v.

Regents of University of California, and Does, 1 through  
99, inclusive,

Respondents.

**ENDORSED  
FILED  
ALAMEDA COUNTY**

**JUL 19 2021**

**CLERK OF THE SUPERIOR COURT**

By \_\_\_\_\_ Deputy

**CHRISTNA ROGERS**

Moen, et al. v. Regents of Univ. of Cal. et al., No. RG 10530492

Decl. of Allan Phillips ISO Application to Close Class, Unclaimed Funds, Fees & Order

1 I say and declare:

2 1. My name is Allan Phillips. I am a Managing Partner and Principal of Phillips  
3 Consulting Partners, LLC. (PCP).

4 2. Phillips Consulting Partners LLC is a global professional services firm specializing  
5 in employee benefits, actuarial consulting, human resources consulting, and health-related  
6 research. The firm's managing principals have over 30 years of experience each in the following  
7 sectors: financial services, consulting, transportation, consumer and medical products,  
8 telecommunications, non-profits, and higher education.

9 3. For approximately 3.5 years, I was employed as an expert by Petitioners in the  
10 litigation that led to the Settlement Agreement signed on December 11, 2019. In the course of  
11 performing these services, I became familiar with the characteristics of 9,000 class members,  
12 the retiree health care benefits that members of the class have received from the Lawrence  
13 Livermore National Security Health and Welfare Benefit Fund for Retirees, and the benefits  
14 class members would have received as University-sponsored retirees. I provided expert  
15 analysis and calculations for the Settlement Agreement and in working with the Parties,  
16 designed the plan to provide Supplemental Payments over the next 20 years to living class  
17 members.

18 4. After the Settlement Agreement was signed, I was hired by the Settlement  
19 Administrator, ARCHER Systems, LLC to provide actuarial services with respect to the  
20 distribution of settlement funds, in particular, the Supplemental Payment. In this capacity, I am  
21 responsible for calculating the cost of providing the Supplemental Payment to living class  
22 members over the next 20 years or until there are 1,000 or fewer class members who are still  
23 living. These calculations are based on the life expectancy of class members, expected  
24 increases in health care costs, the expected return on settlement funds invested by the VE BA  
25 Trustee, Argent Trust Company, and the administrative expenses incurred by the fund to  
26 implement the settlement.

27 5. It is important that the most accurate information be used, including the number  
28 of living class members, their life expectancy, as well as unclaimed settlement funds from the

1 Initial \$1,000 Payment and from Past Damages that will be allocated to the Settlement  
2 Supplement.

3 6. Phillips Consulting Partners agrees with the recommendation of ARCHER Systems  
4 to set a final date for submission of Class Member Data Forms of April 10, 2022 for purposes of  
5 the Initial \$1,000 Payment and Past Damages (if any).

6 I declare under penalty of perjury and the laws of the State of California that the  
7 foregoing declaration was executed by me on July 13, 2021, at Short Hills, New Jersey.

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9   
10 Allan Phillips

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