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13 Attorneys for Petitioners

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15 SUPERIOR COURT OF THE STATE OF CALIFORNIA
16 COUNTY OF ALAMEDA
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19 Wendell G. Moen, Jay Davis Donna Ventura, Robert
Becker, Gregory M. Bianchini, Geores Buttner, Alan
20 Hindmarsh, Steve Hornstein, Cal Wood and Sharon
Wood, on behalf of Themselves and Others Similarly
21 Situated,

22 Petitioners,

23 v.

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

25 Respondents.
26 _____ /

No. RG 10530492

Declaration of Andrew Thomas Sinclair
re Benefit Booklets

Class Action

Trial: Sep 11, 2015

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I say and declare:

1. My name is Andrew Thomas Sinclair. I am one of the attorneys for Petitioners in this action.

2. Petitioners have designated as trial exhibits a number of booklets and related materials that contains statements by the Regents regarding the availability of University-sponsored group health coverage during retirement. The following is a list of the relevant language in these benefit booklets. Consult the exhibit for the complete wording of the document.

3. In the mid-1980s, the Regents began to include "reservation of rights" language in the benefit booklets. This language if not relevant to the two issues that are addressed in this phase of the trial and are not included in the summary set forth below.

4. With regard to conventions followed, we made our best effort to identify the date of each document. This was not possible to do in all cases. Often the date would appear in small type on the back page of the document. We adopted the following approach. When only a year was listed, we used, e.g., 1/1 followed by the year; when only a month was mentioned, we used, e.g., 5/1, followed by the year. When a particular date could be identified, we used that date. With regard to the entries below, we used the name of the document on the top line in bold. We then indented the relevant language. When a section name was relevant, we underlined the name regardless of the formatting in the document itself.

Exh	Date	Bates	Relevant Language
19	1/1/61	15116-15127	<p>University of California – Hospital, Surgical, Medical and Major Medical Expense Benefits</p> <p><u>Who Is Eligible</u> – All employees who are employed by The University of California and are members of the State or University Retirement Systems are eligible to participate in this plan. Annuitants shall also be eligible to participate in this plan. [15118] Employees who cease active work because of retirement and their dependents and any surviving widow or child of a deceased employee or annuitant who is receiving monthly payments from the State or University Retirement Systems will continue to be entitled to benefits, modified, however, in accordance with the following... [15126]</p>
27	11/1/61	7720-7731	<p>Hospital, Surgical, Medical and Major Medical Expense Benefits</p> <p>Employees who cease active work because of retirement ... will continue to be entitled to benefits... [7730]</p>

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Exh	Date	Bates	Relevant Language
30	1/1/62	742-743	University of California – Group Health & Life Insurance Program General Information We consider this coverage to be a significant addition to the University’s existing survivor benefits program under the Retirement System. [742]
32	4/1/63	15128-15149	University of California - Group Life and Health Insurance Plans University employees who cease active work because of retirement ... may continue their coverage. [15141]
35	1/1/64	744-767	University of California - Group Life and Health Insurance Plans University employees who cease active work because of retirement... may continue their coverage... [759]
36	6/1/66	18720-18732	University of California – Group Life Insurance and Health Plan Regulations <u>Continuation of Coverage after Retirement</u> – Health Plan deductions for UCRS Annuitants are transferred to their annuity checks automatically on retirement... SERS Annuitants who wish their Health Plan coverage to continue must indicate their preference on their retirement application., [18730]
37	1/1/67	7740-7747	University of California - Comprehensive Health Plan Annuitants ... may continue coverage... [7745]
38	5/1/67	1-8	The University of California - Comprehensive Health Care Annuitants ... may continue coverage... [6]
39	1/1/68	7732-7739	University of California - Group Insurance and Health Plan Program The health plans may be continued after retirement... [7739]
40	9/1/68	776-783	Group Insurance and Health Plan Program The health plans may be continued after retirement... [783]
46	6/1/69	18733-18746	University of California – Group Life Insurance and Health Plan Regulations <u>Continuation of Coverage after Retirement</u> – UCRS - Health Plan deductions for University of California Retirement System Annuitants are transferred to their annuity checks automatically on retirement... PERS - Public Employees Retirement System Annuitants who wish their Health Plan coverage to continue must indicate their preference on their retirement application... [18744]
50	1/1/70	798-807	The University of California - Basic and Major Medical Annuitants ... may continue coverage... [804-805]

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Exh	Date	Bates	Relevant Language
51	1/1/70	808-816	The University of California - Group Insurance for Employees and their Dependents The health plans may be continued after retirement... [815]
52	1/1/70	789-797	The University of California Comprehensive Health Care Annuitants ... may continue coverage... [794]
55	1/1/71	827-832	The University of California - Employee Group Life Insurance The health plans may be continued after retirement... [828]
56	1/1/71	817-826	The University of California - Group Insurance for Employees and their Dependents The health plans may be continued after retirement... [825]
57	1/1/71	15000-15011	University of California Retirement System - The Retirement Plan <u>Health Insurance during Retirement</u> – You may continue your University-sponsored group health plan coverage for you and your family after you retire... [15005]
58	7/1/71	5575-5596	University of California – The Retirement Plan You may continue your University-sponsored group health plan coverage for you and your family after you retire... [5585]
59	1/1/72	833-844	The University of California - Equitable Basic and Major Medical Annuitants ... may continue coverage... [841-842]
60	1/1/72	18747-18765	University of California – Group Life Insurance and Health Plan Regulations <u>Continuation of Coverage after Retirement</u> ... Health Plan deductions for UCRS and PERS Annuitants are transferred to their annuity checks on retirement... [18762]
61	1/1/72	845-855	The University of California – Equitable Comprehensive Health Care <u>Continuance of Benefits for Annuitants, their Dependents and Survivors</u> – Annuitants and their eligible dependents ... may continue coverage. [¶] Annuitants or survivor annuitants ... are eligible to participate. [852]
62	1/1/73	877-889	The University of California - Equitable Basic and Major Medical Annuitants ... may continue coverage... [887]
63	1/1/73	866-876	The University of California - Equitable Comprehensive Health Care Annuitants ... may continue coverage... [873]

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Exh	Date	Bates	Relevant Language
64	1/1/73	18766-18797	University of California – Group Life Insurance and Health Plan Regulations Continuation of Coverage after Retirement ... Health Plan deductions for UCRS and PERS Annuitants are transferred to their annuity checks on retirement... [18793]
65	1/1/73	856-865	Group Insurance for Employees and their Dependents The health plans may be continued after retirement... [864]
66	1/1/74	895-904	The University of California - Group Insurance for Employees and their Dependents The health plans may be continued after retirement... [903]
67	1/1/74	919-930	The University of California - Equitable Comprehensive Health Care Annuitants ... may continue coverage... [926]
68	1/1/74	905-918	The University of California - Equitable Basic and Major Medical Annuitants ... may continue coverage... [915]
70	1/1/75	944-957	The University of California - Equitable Basic and Major Medical Annuitants ... may continue coverage.... [954]
71	1/1/75	958-967	The University of California – Group Insurance for Employees & their Dependents The health plans may be continued after retirement... [967]
74	1/1/76	968-981	The University of California - Equitable Basic and Major Medical Annuitants ... may continue coverage... [978]
75	1/1/76	7757-7766	University of California - Group Insurance for Employees and their Dependents The health plans may be continued after retirement... [7766]
77	1/1/76	982-993	The University of California - Equitable Comprehensive Health Care Annuitants ... may continue coverage... [989]
79	7/1/76	200-211	The Retirement Plan - for Members Who Do Not Have Social Security Coverage You may continue your University-sponsored group health plan coverage for you and your family after you retire.... [205]
80	1/1/77	15155-15168	University of California - Group Insurance for Employees & their Dependents The health plans may be continued after retirement... [15157]

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Exh	Date	Bates	Relevant Language
81	1/1/77	1035-1046	University of California - Group Insurance for Employees & their Dependents The health plans may be continued after retirement,.. (1037)
84	8/1/77	1009-1020	University of California - Equitable Comprehensive Health Care Annuitants ... may continue coverage... [1016]
85	8/1/77	1021-1034	University of California - Equitable Basic and Major Medical Annuitants ... may continue coverage... [1031]
86	9/1/77	18798-18834	University of California – Group Life Insurance and Health Plan Regulations Continuation of Coverage after Retirement ... Health Plan deductions for UCRS and PERS Annuitants are transferred to their annuity checks on retirement... [18829]
87	10/1/77	5042-5050	Benefits Program at the Lawrence Livermore Laboratory The Lawrence Livermore Laboratory provides a comprehensive program of benefits that offers security for its employees and assures a competitive stance for the Laboratory in bidding for the services of new staff members. The program includes ... a meaningful retirement program... [5046]
89	1/1/78	7767-7776	University of California - Equitable Comprehensive Health Care Annuitants ... may continue coverage.... [7773]
90	1/1/78	184-198	UCRS and Social Security You may continue your University-sponsored group health plan coverage for you and your eligible dependents after you retire... [192]
91	1/1/78	25-39	UCRS and social Security You may continue your University-sponsored group health plan coverage for you and your eligible dependents after you retire... [33]
92	1/1/78	40-51	UCRS - The Retirement Plan for Members Who Do Not have Social Security Coverage You may continue your University-sponsored group health plan coverage for you and your family after you retire... [45]
93	1/1/78	1063-1072	University of California - Equitable Comprehensive Health Care Annuitants ... may continue coverage... [1069]
94	8/1/78	1047-1060	University of California - Group Insurance for Employees & their Dependents The health plans may be continued after retirement... [1049]

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Exh	Date	Bates	Relevant Language
96	1/1/79	52-66	University of California Retirement Plan - UCRS and Social Security You may continue your University-sponsored group health plan coverage for you and your eligible dependents after you retire... [60]
97	1/1/79	67-79	UCRS - The Retirement Plan for Members Who Do Not have Social Security Coverage You may continue your University-sponsored group health plan coverage for you and your family after you retire... [73]
98	5/1/79	80-91	UCRS - The Retirement Plan for Members Who Do Not have Social Security Coverage You may continue your University-sponsored group health plan coverage for you and your family after you retire... [85]
100	8/1/79	108-115	Your Benefits from the University's Retirement Plan and Social Security <u>Health Insurance</u> – University-sponsored health insurance continues after you retire... [114]
102	1/1/80	5020-5025	Benefits – Lawrence Livermore Laboratory The Lawrence Livermore Laboratory provides a comprehensive program of benefits that offers security for its employees and assures a competitive stance for the Laboratory in bidding for the services of new staff members... The program includes ... a meaningful retirement program... [5024]
103	4/1/80	5597-5705	LBL / LLL Your Benefits Program Health Insurance ... Coverage can be continued... [5611, 5621]
104	4/1/80	144-151	Your Benefits from the University's Retirement Plan and Social Security <u>Health Insurance</u> – University-sponsored health insurance continues after you retire... [150]
105	6/1/80	5026-5041	Lawrence Livermore National Laboratory – Benefits information When you retire you can keep your health, dental and legal plan coverages... [5031]
109	1/1/81	3804-3805	Your Benefits When You Retire When you retire, you can continue coverage... [3804]
111	1/1/82	212-239	UCRS - Your retirement plan coordinated with Social Security If the conditions shown in the box are met, UC-sponsored health and dental plan coverage can be continued for yourself and enrolled family members... [224]

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Exh	Date	Bates	Relevant Language
112	1/1/82	5546-5564	<p>Summary of Your Benefits at the University of California</p> <p><u>Who Is Eligible / Retirement Plan Members</u> ... All plans shown are available to you. [5550]</p>
115	1/1/83	15072-15083	<p>Information for Survivors and Beneficiaries of University of California Employees and Retirees</p> <p><u>University Health and/or Dental Plan Coverage</u> – UC-sponsored health and/or dental plan coverage continues as before for the employee's eligible family members who were enrolled in a plan on the date of death... [15077, 15079]</p>
116	1/1/83	532-558	<p>UCRS -- Your retirement plan (Members not covered by Social Security)</p> <p>If the conditions shown in the box are met, UC-sponsored health and dental plan coverage can be continued... [544]</p>
117	1/1/83	509-531	<p>Summary of Your Benefits at the University of California</p> <p>When you retire you can keep your health plan and dental plan coverages... [523]</p>
118	4/1/83	15047-15071	<p>Summary of Your Benefits at the University of California - Information for Regular Faculty</p> <p><u>Retiring Securely</u> – When you retire you can keep your health plan and dental plan coverages; the University's contributions to them continue, provided you retire within four months of separating from the University. Medicare benefits are available when you're age 65 if you qualify-even if you're still working. [15062]</p>
119	1/1/83	18835-18846	<p>Information for Survivors and Beneficiaries of University of California Employees and Retirees</p> <p><u>University Health and/or Dental Plan Coverage</u> – UC-sponsored health and/or dental plan coverage continues as before for the employee's eligible family members who were enrolled in a plan on the date of death... [18840, 18842]</p>
120	9/1/83	18847-18854	<p>Important Information About Your Health Plan and Medicare</p> <p>[Y]ou may cancel your UC health plan at any time and choose Medicare as your only coverage. However, we believe you will have better coverage in most cases, if you keep a UC health plan. PLEASE NOTE: you are not eligible for a UC health plan after retirement unless you were enrolled in one immediately before retiring. [18850]</p>
122	1/1/84	559-586	<p>UCRS — Your retirement plan coordinated with Social Security</p> <p>If the conditions shown in the box are met, UC-sponsored health and dental plan coverage can be continued... [571]</p>

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Exh	Date	Bates	Relevant Language
123	1/1/84	3801-3802	Your Benefits When You Retire When you retire, you can continue health and dental coverage for yourself and your family... [3801-3802]
125	1/1/84	6759-6786	University of California – UCRS <u>UC Health & Dental Plans</u> – If the conditions shown in the box are met, UC-sponsored health and dental plan coverage can be continued for yourself and enrolled family members when UCRS monthly benefits are paid.. [6771]
127	1/1/85	587-609	Summary of Your Benefits at the University of California <u>The Other Part of Your Compensation</u> – Up-to-date, quality benefit plans make up a large part of your compensation at the University of California. [¶] Your benefits are like a second paycheck, because the University covers all or most of the costs of many plans. [591] If you retire within four months of leaving the University, you may keep University-sponsored health and dental plans... [603]
128	1/1/85	18859-18883	Summary of Your Benefits at the University of California - Information for Regular Faculty If you retire within four months of leaving the University, you may keep University-sponsored health and dental plans. [18877]
131	1/1/86	3795-3796	Checklist on Your Benefits When You Retire When you retire, you can continue health and dental coverage... [3795]
132	7/1/86	15084-15095	Information for Survivors and Beneficiaries of University of California Employees and Retirees <u>University Health and/or Dental Plan Coverage</u> – UC-sponsored health and/or dental plan coverage continues as before for eligible family members who were enrolled in a plan on the employee's date of death... [15089, 15091]
133	8/1/86	391-419	UC Employee Benefits Plan - Retirement Handbook If you meet the eligibility requirements, UC will continue to contribute toward your medical and dental plan premiums... [404]
134	11/1/86	5066-5081	Benefits - Lawrence Livermore Laboratory When you retire you can keep your health, dental and legal plan coverages; the Laboratory's contributions to the health and dental plans continue, provided you retire within four months of separating from the Laboratory. [5070]

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Exh	Date	Bates	Relevant Language
136	3/1/88	5051-5065	<p>Benefits – Lawrence Livermore Laboratory</p> <p>When you retire you can keep your health, dental and legal plan coverages; the Laboratory's contributions to the health and dental plans continue, provided you retire within four months of separating from the Laboratory. [5055]</p>
139	1/1/90	1162-1163	<p>Your Health Benefits When You Retire</p> <p>If you meet eligibility requirements, the University may continue to contribute toward the cost of your University-sponsored medical and dental coverage when you retire... [1162]</p>
140	1/1/90	1073-1088	<p>University of California - Group for Employees & their Dependents</p> <p>The health plans may be continued after retirement... [1075] If you are enrolled in a University-sponsored health plan and do not terminate employment, you may continue this coverage... [1081]</p>
141	5/1/90	5730-5746	<p>The Retiree Handbook (published by the Benefits Office LLNL)</p> <p><u>Medical and Dental</u>: Whether a member, of PERS or UCRP, your University group medical and dental plans may be continued when you retire... [5743]</p>
142	10/1/90	1152-1155	<p>Dental</p> <p>The University will continue to pay for your dental coverage when you retire <i>only</i> if you meet eligibility requirements. In general, employees hired on or after January 1, 1990, must have 10 years of University service credit to qualify for coverage and for 50% of the University contribution; 20 years to qualify for 100%. [1155]</p>
143	1/1/91	1156-1161	<p>Your Career Benefits</p> <p><u>Annuitant Eligibility</u> – If you were hired before January 1, 1990: To be eligible for annuitant medical and dental insurance, you must be eligible to receive monthly retirement income from a UC-sponsored defined benefit plan (such as UCRP). [¶] If you elect to retire between ages 50 and 54, you must have 10 years of qualifying service credit to continue annuitant medical and dental insurance. Those receiving monthly survivor or disability income from a University-sponsored defined benefit plan may continue their medical and dental plan coverage. [1159 & fn. 3]</p>
144	1/1/91	3814-3819	<p>Your Career Benefits – an Overview</p> <p><u>Annuitant Eligibility</u> ... In general, you need at least 10 years of credited service in a UC-sponsored defined benefit plan based on University employment to qualify for coverage as an annuitant. [¶] If you were hired before January 1, 1990: To be eligible for annuitant medical and dental insurance, you must be eligible to receive monthly retirement income from a UC-sponsored defined benefit plan (such as UCRP). [3817]</p>

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Exh	Date	Bates	Relevant Language
145	1/1/91	1148-1151	Medical - The Basics The University will continue to contribute toward your medical coverage when you retire only if you meet eligibility requirements... [1151]
146	1/1/92	1164-1169	Medical - The Basics If you meet the eligibility requirements, you may continue your UC-sponsored medical coverage when you retire... [1167]
147	1/1/92	1176-1181	Your Career Benefits <u>When You Retire</u> – In general, to continue your UC-sponsored medical and dental coverage when you retire, you must have at least 10 years of UCRP service credit. [1179]
148	1/1/92	1170-1175	Dental Insurance <u>When You Retire</u> – If you meet the eligibility requirements, you may continue your UC-sponsored dental coverage when you retire and UC will continue to contribute toward the cost. [1173]
150	1/1/92	6640-6645	Medical – The Basics If you meet the eligibility requirements, you may continue your UC-sponsored medical coverage when you retire... [6643]
151	1/1/93	1188-1226	University of California – Your Group Insurance Plan <u>Medical</u> – If you meet the eligibility requirements, you may continue your UC-sponsored medical coverage when you retire. [1199] [¶] <u>Dental</u> – If you meet the eligibility requirements, you may continue your UC-sponsored dental coverage when you retire. [1202]
152	1/1/93	1182-1187	Career Benefits If you meet the eligibility requirements, you may continue your UC-sponsored medical and dental coverage when you retire... [1183]
153	1/1/93	6453-6491	University of California – Your Group Insurance Plans <u>If You Were Hired Before January 1,1990</u> – If you retire at age 55 or later and have at least five years of service credit, you may continue coverage with 100% of the UC contribution. [6470]
154	1/1/94	1227-1271	Your Group Insurance Plans If you meet the eligibility requirements, you may continue your UC-sponsored medical coverage when you retire... [1243]
155	1/1/94	1272-1277	Employee Eligibility Factsheet - UC Group Insurance Plans When you retire (or begin to receive UCRP disability income or survivor income), you may be eligible to continue your medical and/or dental coverage ... [1275]

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Exh	Date	Bates	Relevant Language
158	1/1/95	1278-1328	Your Group Insurance Plans If you meet the eligibility requirements, you may continue your UC-sponsored medical coverage when you retire... [1298]
159	3/1/95	297-323	UCRP Monthly Retirement Income - Election Kit If you are retiring within 120 days of leaving UC employment and are eligible, you may continue your medical, dental, and/or legal coverage... [302]
160	3/1/95	1335-1342	UC Group Insurance Plans – Eligibility Factsheet If you retire before age 55 and you have 10 years of service credit ... you are eligible to continue coverage... [1341]
162	1/1/96	1343-1400	Your Group Insurance Plans If you meet the eligibility requirements, you may continue your UC-sponsored medical coverage when you retire... [1366]
163	1/1/96	1401-1406	Dental <u>When You Retire</u> – If you meet the eligibility requirements, you may continue your UC-sponsored dental coverage when you retire. [1403]
164	1/1/97	1411-1469	Your Group Insurance Plans If you meet the eligibility requirements, you may continue your UC-sponsored medical coverage when you retire... [1433]
165	1/1/97	1407-1410	Annuitant Dental Plan Summary You are eligible for UC annuitant dental coverage only if you were eligible and enrolled in dental coverage when you retired and you elected to continue your dental plan into retirement. [1407]
166	3/1/97	1527-1534	Eligibility Factsheet When you retire (or begin to receive UCRP disability income or survivor income), you may be eligible to continue your UC medical, dental and/or legal coverage... [1533]
167	10/1/97	1535-1546	Eligibility Factsheet - University of California Group Insurance When you retire (or begin to receive UCRP disability income or survivor income), you may be eligible to continue your UC medical, dental and/or legal coverage... [1543]
168	1/1/98	1547-1605	Your Group Insurance Plans If you meet the eligibility requirements, you may continue your UC-sponsored medical coverage when you retire... [1572]

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Exh	Date	Bates	Relevant Language
169	1/1/98	3857-3880	<p>Retirement Handbook – UC Employee Benefits Plan Administration</p> <p>Eligibility to continue medical and dental coverage into retirement is determined first by the date you were hired: ... If you are eligible to receive monthly retirement income from UCRP or PERS and are at least age 55, you may continue medical and/or dental coverage ... [3874]</p>
170	1/1/98	15283-15303	<p>University of California – Survivor and Beneficiary Handbook</p> <p><u>Medical and Dental Coverage</u> – If you were enrolled as an eligible family member in a UC-sponsored medical and/or dental plan at the time of the member's death, you can continue coverage if ... you ... receive monthly income as an eligible survivor or contingent annuitant ... the monthly benefit covers any monthly plan cost ... [and] the monthly benefit becomes payable within 120 calendar days of the date of death; and your coverage is continuous. [15292]</p>
171	1/1/98	3891-3898	<p>University of California – Group Insurance Eligibility (Factsheet)</p> <p><u>Annuitants and UC’s Contribution - Medical & Dental Plans</u> – When you retire ... you may be eligible to continue your UC medical, dental and/or legal coverage... [¶] ... <u>Eligibility Requirements</u> – If you were hired in a career position before January 1, 1990, and you have not had a break in service of more than 120 days, you will receive 100% of UCs maximum contribution toward the plan premium. [3897]</p>
172	1/1/98	1606-1609	<p>Dental Plan Summary</p> <p><u>Annuitants</u> – You are eligible for coverage only if you were eligible and enrolled in dental coverage when you retired and you elected to continue your dental plan into retirement. [1606]</p>
174	7/1/98	3928-3994	<p>Your Group Insurance Plans</p> <p>If you meet the eligibility requirements, you may continue your UC-sponsored medical coverage when you retire... [3954]</p>
175	8/1/98	4061-4096	<p>Election Handbook</p> <p>Generally, if you are eligible to continue coverage and you elect monthly retirement income, you may continue the same coverage... [4069]</p>
176	8/1/98	4097-4129	<p>UC Retirement Handbook</p> <p>If you elect UCRP monthly retirement income, you may be eligible to continue your UC medical and/or dental coverage ... [4113]</p>
178	1/1/99	4265-4294	<p>University of California Retirement Plan – Election Handbook</p> <p><u>UC-sponsored Health and Welfare Coverage</u> ... Generally, if you are eligible to continue coverage and you elect monthly retirement income, you may continue the same coverage. [4274]</p>

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Exh	Date	Bates	Relevant Language
182	1/1/99	15317-15337	<p>University of California – Survivor and Beneficiary Handbook</p> <p><u>Medical and Dental Coverage</u> – If you were enrolled as an eligible family member in a UC-sponsored medical and/or dental plan at the time of the member's death, you can continue coverage if ...you ... receive monthly income as an eligible survivor or contingent annuitant from UCRP ... the monthly benefit covers any monthly plan cost ... the monthly benefit becomes payable within 120 calendar days of the date of death ... and your coverage is continuous. [15326]</p>
183	1/1/99	4195-4252	<p>Your Group Insurance Plans</p> <p>When you retire, you may continue some of your UC-sponsored benefits as a UC annuitant... [¶] If you meet the eligibility requirements, you may continue your UC-sponsored medical and dental coverage when you retire... [¶] You may continue medical and dental coverage as an annuitant... [4212]</p>
185	1/1/00	3088-3150	<p>Your Group Insurance Plans</p> <p>When you retire, you may continue some of your UC-sponsored benefits as a UC annuitant... [¶] If you meet the eligibility requirements, <i>you may continue your UC-sponsored medical and dental coverage when you retire...</i> [3106]</p>
186	11/1/00	3047-3066	<p>University of California – Open Enrollment (2000)</p> <p>Our valuable health and welfare package is one of the outstanding benefits of working for the University. As an employer, the University strives to provide a choice of health plans with a range of employee/retiree premium costs. [3068]</p>
187	11/1/00	6549-6568	<p>University of California – Open Enrollment - California Annuitants (2000)</p> <p>Our valuable health and welfare package is one of the outstanding benefits of working for the University... Our health and welfare plans consider the diverse needs of our employees and annuitants and their families, and we are committed to providing access to quality providers, including UC medical centers... [6529]</p>
188	1/1/00	3023-3026	<p>Dental Plan Summary</p> <p><u>Annuitants</u> – You are eligible for coverage only if you were eligible and enrolled in dental coverage when you retired <i>and</i> you elected to continue your dental plan into retirement. [2023]</p>
191	12/1/00	6820-6848	<p>University of California Retirement Plan - Election Handbook</p> <p>You must make your decision to continue (or cancel) UC-sponsored medical, dental and/or legal coverage at the time you elect monthly retirement income... [6829]</p>
192	1/1/01	3151-3215	<p>Your Group Insurance Plans</p> <p>When you retire, you may continue some of your UC-sponsored benefits as a UC annuitant... [3170]</p>

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Exh	Date	Bates	Relevant Language
194	5/1/01	4427-4434	<p>University of California – The benefits of belonging</p> <p>The benefits of belonging reflect the University's commitment to recruiting, rewarding, developing, and retaining employees of the very highest caliber. Our strength depends on it. [4428] [¶] Vested members may retire at age 50... Alternative options include a lump sum cashout. (Members who elect the lump sum cashout forfeit rights to future retirement, survivor, disability, and retiree health benefits.) [4432]</p>
195	6/1/01	4435-4468	<p>Retirement Handbook</p> <p>If you elect UCRP monthly retirement income, you may be eligible to continue your UC medical and/or dental coverage... [4451]</p>
196	1/1/02	4488-4508	<p>University of California – Open Enrollment for California Annuitants (2002)</p> <p>UC's health and welfare benefits package retains a high industry standard, particularly compared to other major employers... [4489] <u>Health and Welfare Plans</u> – UC continues to offer annuitants an array of health and welfare plans that give a high degree of insurance coverage at affordable costs. [4503]</p>
198	5/1/02	4604-4615	<p>Group Insurance Eligibility Factsheet</p> <p>When you retire or begin receiving UCRP disability income (or survivor income), you may be eligible to continue your UC-sponsored medical and/or dental and/or legal coverage... [4613]</p>
199	1/1/03	2427-2442	<p>University of California – Benefits for Domestic Partners</p> <p><u>Employee retires</u> – An employee may be able to continue medical/dental/legal coverage into retirement. A same-sex domestic partner (and/or partner's child/grandchild) who is enrolled as a family member at the time of retirement may be able to continue coverage as well. [2430]</p>
200	1/1/03	2323-2395	<p>University of California - Your Group Insurance Plans 2003</p> <p>When you retire, you may be eligible to continue your UC-sponsored medical and dental coverage as an annuitant... [2346]</p>
202	2/1/03	2396-2425	<p>Election Handbook</p> <p>You must make your decision to continue (or cancel) UC-sponsored medical, dental and/or legal coverage at the time you elect monthly retirement income... [2406]</p>
204	7/1/03	15338-15362	<p>University of California – Survivor and Beneficiary Handbook</p> <p><u>Medical, Dental, and Legal Coverage – Eligibility Requirements</u> – If you were enrolled as a family member in a UC-sponsored medical, dental, and/or legal plan at the time of the employee's death, you can continue coverage... [15353]</p>

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203	7/1/03	15363-15385	University of California – Survivor and Beneficiary Handbook <u>Medical, Dental, and Legal Coverage</u> – If you were enrolled as an eligible family member in a UC-sponsored medical, dental, and/or legal plan at the time of the member's death, you can continue coverage... [15372]
206	1/1/04	3281-3333	Your Group Insurance Plans 2004 If you meet the eligibility requirements, you may continue your UC-sponsored medical, dental, and legal coverage when you retire... [3294]
207	1/1/04	1743-1806	University of California – Your Group Insurance Plan <u>When You Retire</u> – When you retire, you may be eligible to continue your UC-sponsored medical, dental and legal coverage as an annuitant. [¶] <u>Medical, Dental, and Legal Plans</u> – If you meet the eligibility requirements, you may continue your UC-sponsored medical, dental, and legal coverage when you retire. [1762]
210	5/1/04	2457-2488	Retirement Handbook If you elect UCRP monthly retirement income, you may be eligible to continue your UC medical and/or dental coverage... [2473]
211	6/1/04	2489-2516	Election Handbook Generally, if you are eligible to continue coverage and you elect monthly retirement income, you may continue the same coverage... [2497]
212	7/1/04	2524-2554	Retirement Handbook UC currently offers continuation of medical, dental and legal insurance to eligible UCRP members who elect UCRP monthly retirement income... [2541]
213	1/1/05	3682-3687	University of California – Open Enrollment (2005) <u>If You Retire in 2005</u> – UC may pay from 50 percent to 100 percent of the monthly employer contribution for eligible retirees, based on when retirement plan membership began, service credit, and other factors. [3684]
214	1/1/05	15401-15422	University of California – Survivor and Beneficiary Handbook <u>Medical, Dental, and Legal Coverage</u> – If you were enrolled as an eligible family member in a UC-sponsored medical, dental, and/or legal plan at the time of the member's death, you can continue coverage... [15411]
215	1/1/05	2563-2566	Dental Plan Summary <u>Retirees:</u> You are eligible for coverage only if you were eligible for and enrolled in dental coverage when you retired and you elected to continue your dental plan into retirement. [2566]

Exh	Date	Bates	Relevant Language
216	1/1/05	3688-3693	University of California – Open Enrollment (2005) <u>If You Retire in 2005</u> – UC may pay from 50 percent to 100 percent of the monthly employer contribution for eligible retirees, based on when retirement plan membership began, service credit, and other factors. [3690]
217	1/1/05	6252-6257	University of California – Open Enrollment (California Faculty & Staff) (2005) <u>If You Retire in 2005</u> – UC may pay from 50 percent to 100 percent of the monthly employer contribution for eligible retirees... [6254]
218	1/1/05	2584-2597	University of California – Benefits for Domestic Partners <u>Employee retires</u> – An employee may be able to continue medical/dental/legal coverage into retirement. A same-sex domestic partner (and/or partner’s child/grandchild) who is enrolled as a family member at the time of retirement may be able to continue coverage as well. [2587]
219	1/1/05	4381-4392	Group Insurance Eligibility Factsheet When you retire or begin receiving UCRP disability income (or survivor income), you may be eligible to continue your UC-sponsored medical and/or dental coverage... [4390]
220	2/1/05	1807-1867	Your Group Insurance Plans When you retire, you may be eligible to continue your UC-sponsored, medical, dental and legal coverage as a retiree... [1827]
221	8/1/05	2112-2137	Survivor and Beneficiary Handbook - For Family Members and Beneficiaries of UC Employees If you were enrolled as a family member in a UC-sponsored medical, dental, and/or legal plan at the time of the eligible employee's death, you can continue coverage... [2127]
222	8/1/05	2633-2653	Retirement Handbook UC currently offers continuation of medical, dental and legal insurance to eligible UCRP members who elect UCRP monthly retirement income... [2650]
223	8/30/05	6400-6427	Retirement Handbook UC currently offers continuation of medical, dental and legal insurance to eligible UCRP members who elect UCRP monthly retirement income... [6420]
224	10/1/05	2710-2737	Election Handbook Generally, if you are eligible to continue coverage and you elect monthly retirement income, you may continue the same coverage... [2717]
225	1/1/06	2654-2681	Open Enrollment – Retirees with and without Medicare <u>Reminder:</u> As a retiree, you and your eligible family members may continue your medical, dental and legal plans. [2676]


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Exh	Date	Bates	Relevant Language
226	1/1/06	3510-3525	<p>University of California – Benefits of Belonging – UC Staff Employment Benefits</p> <p>The University of California values and takes pride in the caliber of its staff, who enjoy an outstanding total compensation program comprising salary plus a wide array of high quality benefit plans from which to choose. Our benefits package includes generous leave provisions, comprehensive health and welfare insurance plans protecting you and your family, a generous pension plan, and optional retirement savings opportunities. [¶] UC benefits are acknowledged as among the very finest in higher education... [3511] Those who retire with monthly retirement income and meet qualification rules may continue their UC-sponsored medical, dental, and legal coverage, with UC paying a portion or all of the monthly employer premium for medical and dental coverage. [3524]</p>
227	1/1/06	3694-3699	<p>University of California – Open Enrollment (2006)</p> <p><u>If You Retire in 2006</u> – UC may pay from 50 percent to 100 percent of the monthly employer contribution for eligible retirees, based on when retirement plan membership began, service credit, and other factors. [3696]</p>
228	1/1/06	1868-1928	<p>University of California – Your Group Insurance Plan</p> <p>Benefits are an important part of your University of California compensation package... <u>When You Retire</u> – When you retire, you may be eligible to continue your UC-sponsored medical, dental and legal coverage as a retiree. [¶] Retirement and Lump Sum Cashout – If you retire under the UC Retirement Plan and receive monthly retirement income, you may be eligible to continue certain benefits. [¶] <u>Medical, Dental, and Legal Plans</u> – If you meet the eligibility requirements, you may continue your UC-sponsored medical, dental, and legal coverage when you retire. [1888]</p>
229	10/1/06	5870-5873	<p>The Benefits of Belonging - UC Staff Employment Benefits</p> <p>Those who retire with monthly retirement income and meet qualification rules may continue UC-sponsored medical, dental, and legal coverage... [5873]</p>
230	1/1/07	2281-2288	<p>University of California Retirement Plan – Open Enrollment for retirees</p> <p><u>Reminder:</u> As a retiree, you and your eligible family members may continue your medical, dental and legal plans. [2286]</p>
231	1/1/07	6284-6289	<p>University of California – Open Enrollment (California Faculty & Staff)</p> <p><u>If You Retire in 2007</u> – UC may pay from 50 percent to 100 percent of the monthly employer contribution for eligible retirees, based on when retirement plan membership began, service credit, and other factors. [6287]</p>
233	1/1/07	1929-1977	<p>Your Group Insurance Plans</p> <p>You are eligible for Full Benefits if you are a member of a UC-sponsored retirement plan... [1933]</p>

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Exh	Date	Bates	Relevant Language
234	3/1/07	6302-6333	Election Handbook Generally, if you are eligible to continue coverage and you elect monthly retirement income, you may continue the same coverage... [6311]
235	3/1/07	3755-3776	Retirement Handbook UC currently offers continuation of medical, dental and legal insurance to eligible UCRP members who elect UCRP monthly retirement income. [3772]
236	7/1/10		Final Report of the President's Task Force on Post-Employment Benefits (July 2010) http://sites.uci.edu/academicssenate/files/2014/05/Final-Report-of-the-President%E2%80%99s-Task-Force-on-Post-Employment-Benefits-July-2010.pdf
237	7/1/10		Executive Summary The Report of The President's Task Force on Post-Employment Benefits (July 2010) http://sites.uci.edu/academicssenate/files/2014/02/PEB-FinalRep-ExecSum-Jul2010.pdf

I declare under penalty of perjury that the foregoing is true and correct and that I signed this declaration on July 15, 2015, at Oakland, CA.


Andrew Thomas Sinclair