

***UFCW UNIONS AND CONTRIBUTING
EMPLOYERS LEGAL BENEFITS FUND
FIRST QUARTER 2025***

ADMINISTRATIVE MANAGER'S REPORT

FIRST QUARTER 2025 CONTRIBUTIONS

<u>COMPANY</u>	<u>RATE</u>	<u>CONTRACT</u>	<u>PARTICIPANTS</u>	<u>CONTRIBUTIONS</u>
SHOPPERS ¹	\$28.84	MOB	428	\$36,973
SHOPPERS ^{1,2}	19.57	MOB	302	17,691
UFCW LOCAL 400 ^{1,3}	28.84	MOB	19	1,482
UFCW LOCAL 400 ^{1,2,3}	19.57	MOB	28	1,079

TOTAL			777	\$57,225
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AVERAGE MONTHLY CONTRIBUTION \$24.55

¹RATE INCREASE AS OF 1/1/25

²EMPLOYEES HIRED ON OR AFTER JANUARY 1, 2014

³INCLUDES CREDIT OF \$707.19

FIRST QUARTER 2025
EXPENSES

PROVIDER

	<u>AMOUNT</u>		<u>AVERAGE MONTHLY COST</u>		<u>PERCENTAGE</u>
AKMAN & ASSOCIATES	\$44,188		\$18.957		80.00%
SUBTOTAL	\$44,188		\$18.957		80.00%

OPERATING EXPENSES

	<u>AMOUNT</u>		<u>AVERAGE MONTHLY COST</u>		<u>PERCENTAGE</u>
ADMINISTRATION	\$4,255		\$1.825		7.703%
BONDING & INSURANCE	596		0.256		1.079%
INVESTMENT MGMT	63		0.027		0.114%
LEGAL	5,723		2.455		10.361%
MEETING	85		0.036		0.154%
PRINTING	326		0.140		0.590%
SUBTOTAL	\$11,048		\$4.739		20.00%
TOTAL	\$55,236		\$23.696		100.00%

FIRST QUARTER 2025 QUARTERLY RECAP

	<u>FIRST 2025</u>	<u>SECOND 2025</u>	<u>THIRD 2025</u>	<u>FOURTH 2025</u>	<u>TOTAL</u>
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EMPLOYER CONTRIB	\$57,225				\$57,225
EMPLOYEE CONTRIB	0				0
INTEREST/DIVIDENDS	91				91

TOTAL INCOME	\$57,316	\$0	\$0	\$0	\$57,316
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EXPENSES

PROVIDERS	\$44,188				\$44,188
OPERATING	11,048				11,048

TOTAL EXPENSES	\$55,236	\$0	\$0	\$0	\$55,236
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TOTAL INCOME	\$57,316	\$0	\$0	\$0	\$57,316
TOTAL EXPENSES	\$55,236	\$0	\$0	\$0	\$55,236

SURPLUS (DEFICIT)	\$2,080	\$0	\$0	\$0	\$2,080
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AVERAGE INCOME	\$24.59	\$0.00	\$0.00	\$0.00	\$24.59
AVERAGE EXPENSES	\$23.70	\$0.00	\$0.00	\$0.00	\$23.70

SURPLUS (DEFICIT)	\$0.89	\$0.00	\$0.00	\$0.00	\$0.89
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PARTICIPANTS	777				777
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FUND RESERVE	\$5,219				
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2024
QUARTERLY RECAP

FIRST 2024 SECOND 2024 THIRD 2024 FOURTH 2024 TOTAL

EMPLOYER CONTRIB	\$51,846	\$52,833	\$52,862	\$54,590	\$212,131
EMPLOYEE CONTRIB	0	0	0	0	0
INTEREST/DIVIDENDS	52	77	116	49	294

TOTAL INCOME	\$51,898	\$52,910	\$52,978	\$54,639	\$212,425
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EXPENSES

PROVIDERS	\$38,628	\$40,355	\$42,501	\$42,523	\$164,007
OPERATING	8,535	9,607	16,338	9,006	43,486

TOTAL EXPENSES	\$47,163	\$49,962	\$58,839	\$51,529	\$207,493
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TOTAL INCOME	\$51,898	\$52,910	\$52,978	\$54,639	\$212,425
TOTAL EXPENSES	\$47,163	\$49,962	\$58,839	\$51,529	\$207,493

SURPLUS (DEFICIT)	\$4,735	\$2,948	(\$5,861)	\$3,110	\$4,932
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AVERAGE INCOME	\$24.75	\$24.43	\$24.39	\$24.16	\$24.43
AVERAGE EXPENSES	\$22.49	\$23.07	\$27.09	\$22.78	\$23.86

SURPLUS (DEFICIT)	\$2.26	\$1.36	(\$2.70)	\$1.38	\$0.57
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PARTICIPANTS	699	722	724	754	725
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FUND RESERVE	\$568	\$5,872	\$1,764	\$21,094	
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FIRST QUARTER 2025
UTILIZATION

AKMAN & ASSOCIATES

CODE	TYPE	CASES* OPEN	ATTORNEY HOURS	PARALEGAL HOURS	SURCHG.
01	FAMILY	7	37.10	26.55	
02	PROBATE	3	14.65	20.60	
03	WILL	8	25.20	23.30	
04	NEGLIGENCE	7	29.25	35.80	
05	REAL ESTATE	4	16.10	9.65	
06	CONSUMER	12	57.85	50.45	
07	CRIMINAL	4	32.95	7.05	
08	TRAFFIC	5	31.80	9.75	
09	LANDLORD/TENANT	2	7.10	5.15	
10	ADMINISTRATIVE	5	25.65	18.65	
11	IMMIGRATION	0	0.00	0.00	
12	MISCELLANEOUS	0	0.00	0.00	
13	WORKER'S COMP.	0	0.00	0.00	
14	JUVENILE	4	24.05	7.55	
15	CIVIL LITIGATION	0	0.00	0.00	
16	T CASES	0	0.00	0.00	
TOTAL		61	301.70	214.50	\$0

ALL HOURS	516.20
ADJUSTED HOURS	408.95
PAYMENT	\$44,188
COST PER HOUR	\$108.05

* CASES OPEN DURING QUARTER. HOURS REFLECT NEWLY OPENED CASES AND PRIOR CASES.

FIRST QUARTER 2025
DELINQUENCIES

None