**cASE STUDY DETAILS OPQ PLAN LEAVERS –PRESERVED**

**WITH SPECIAL CIRCUMSTANCES**

**Event history**

Date of first event **06/09/2019** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **THOMAS** Forenames **MARIA**

Date of birth **22/10/1956** Gender **FEMALE**

Spouse's date of birth **07/01/1955**

Dependent child's date of birth

Date of joining company **30/11/2015**

Date of joining scheme **30/11/2015**

Target retirement date  **22/05/2021**

**Annual salary history for the plan year commencing 6 April**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  | **18,744** | **19,984** | **21,462** | **23,888** | **26,407** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£ 3,483.25**

Total employer’s normal contributions **£ 4,852.18**

Total member's AVCs **£ 1,230.00**

**Personal Retirement Account details**

**Member’s Current Unit Holdings**

|  |  |  |  |
| --- | --- | --- | --- |
| **Fund** | **Member’s normal contributions**  **Unit Holdings** | **Employer’s normal contributions**  **Unit Holdings** | **Member’s**  **AVCs**  **Unit Holdings** |
| Global Equity Fund | 0.0000 | 0.0000 | 0.0000 |
| Index Linked Bond Fund | 0.0000 | 0.0000 | 0.0000 |
| Balanced Fund | 0.0000 | 0.0000 | 152.4632 |
| Corporate Bond Fund | 0.0000 | 0.0000 | 0.0000 |
| Cash Fund | 0.0000 | 0.0000 | 0.0000 |
| Lifestyle Fund | 1263.7984 | 1354.2469 | 0.0000 |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.847 |
| Index Linked Bond Fund | 1.498 |
| Balanced Fund | 4.383 |
| Corporate Bond Fund | 2.637 |
| Cash Fund | 1.017 |

**Special circumstances / additional information**

Ms Thomas’s reason for leaving was Voluntary.

**LEAVERS PRESERVED [WITH**

**SPECIAL CIRCUMSTANCES]**

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