Letter to **JACOB THOMPSON**

 **Key Points**

1. Date of leaving **(04/09/2019)**
2. Value of total unit holdings Personal Retirement Account (PRA) at date of leaving **(£69,763.64)**

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| **Member contributions** |  |
| Global Equity | 3,503.6394 x £3.847 = £13,478.50 |
| Index Linked | 2,064.5239 x £1.498 = £3,092.66 |
| Corporate  | 3,761.9547 x £2.637 = £9,920.27 |
| **Total** |  **£26,491.43** |
|  |  |
| **Employer contributions** |  |
| Global Equity | 5,842.9573 x £3.847 = £22,477.86 |
| Index Linked | 4,513.4563 x £1.498 = £6,761.16 |
| Corporate  | 5,321.6496 x £2.637 = £14,033.19 |
| **Total** |  **£43,272.21** |

1. Value of Employee contributions **(£26,491.43**)
2. Value of Employer contributions **(£43,272.21)**
3. Normal Pension Date or Age **(02/07/2031 or SPA if later)**
4. Funds remain invested and annual statements will be issued
5. Access to benefits from Minimum Pension Age (or earlier if ill health)
6. Annuity Purchase Option with Annuity Bureau Charge if purchased through the OPQ Plan
7. Tax free lump sum option
8. Single UFPLS option
9. Early retirement option
10. Death before retirement (PRA Payable to Legal Personal Representatives)
11. Transfer option/ Open Market Option- mention this would be required if want FADD or series of UFPLS from MPA
12. Pension Wise if want to take advantage of flexibilities (now part of the Single Financial Guidance body)
13. Mention AA and MPA trigger if UFPLS or FADD (no further detail required)

NOTE: **Letters should be written in full and should include all of the information contained in each of the bullet points.** Failure to write a letter in full will result in marks being lost. Failure to mention the information contained in each of the bullet points will result in marks being lost.