**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **15/04/2008** First event **PRESERVED**

Date of second event **08/09/2019** Second event **DEATH**

**Member details**

Surname **HUSSEN** Forenames **RAJESH**

Date of birth **18/11/1962** Gender **MALE**

Spouse's date of birth **21/05/1971**

Dependent child's date of birth

Date of joining company **23/06/1997**

Date of joining scheme **23/06/1997**

Target retirement date **18/11/2020**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **48,275.00**

Total employer’s normal contributions **£ 77,240.00**

Total member's AVCs **£**

**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 |  |  |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  |  |  |
| Lifestyle Fund |  28,451.2486 |  42,521.9781 |   |

**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**

Rajesh Hussen’s current available Lifetime Allowance is 58.14%.