**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **03/09/2019** First event **DEATH**

Date of second event Second event

**Member details**

Surname **MCGAVIN** Forenames **PAM**

Date of birth **20/11/1952** Gender **FEMALE**

Spouse's date of birth **12/09/1949**

Dependent child's date of birth

Date of joining company **18/06/2007**

Date of joining scheme **18/06/2007**

Target retirement date **20/12/2020**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
| **40,978** | **41,547** | **42,118** | **42,742** | **43,512** | **31,502** | **32,704** | **35,031** | **37,412** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **41,875.00**

Total employer’s normal contributions £ **67,000.00**

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 | 32,178.1457 | 46,781.4500 |   |

**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**

In August 2009, Pam McGavin transferred in benefits from a previous personal pension scheme. The transfer value of £37,218.00 purchased 19,862.1075 units in the Global Equity Fund. These units are not included in the values shown above.

Pam McGavin’s current available Lifetime Allowance is 96.12%.