CASE STUDY DETAILS opq PLAN TRANSFERS

 Question 3

**Event history**

Date of first event **23/07/2008** First event **TRANSFER OUT**

Date of second event **02/09/2020** Second event

**Member details**

Surname **BLANCHET** Forenames **MARIBEL**

Date of birth **18/10/1956** Gender **FEMALE**

Spouse's date of birth **03/09/1955**

Dependent child’s date of birth

Date of joining company **15/06/1998**

Date of joining scheme **15/06/1998**

Target retirement date **18/09/2021**

**Contribution history**

Total member's normal contributions **£ 9,126.74**

Total employer's normal contributions **£ 14,602.78**

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 |  0.0000 |  0.0000 |  0.0000 |
| Index Linked Bond Fund |  0.0000 |  0.0000 |  0.0000 |
| Balanced Fund |  0.0000 |  0.0000 |  0.0000 |
| Corporate Bond Fund |  0.0000 |  0.0000 |  0.0000 |
| Cash Fund |  0.0000 |  0.0000 |  0.0000 |
| Lifestyle Fund |  10,352.1633 |  16,563.4613 |  0.0000 |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund |  **3.723** |
| Index Linked Bond Fund | **1.486** |
| Balanced Fund | **4.217**  |
| Corporate Bond Fund | **2.734** |
| Cash Fund | **1.014**  |

**Special circumstances / additional information**

 **TRANSFERS**

 **QUESTION 3**