**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **27/08/2021** First event **DEATH**

Date of second event Second event

**Member details**

Surname **BENITO** Forenames **ANDRIN**

Date of birth **12/02/1975** Gender **MALE**

Spouse's date of birth **22/07/1980**

Child dependant date of birth

Date of joining company **15/04/2011**

Date of joining scheme **15/04/2011**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
|  |  |  |  |  |  |  |  |  |
| **20,396** | **21,211** | **22,696** | **23,173** | **23,984** | **24,488** | **25,712** | **26,020** | **26,281** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **10,698.05**

Total employer’s normal contributions **£ 17,116.88**

Total member's AVCs **£ 4,279.22**

**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 | 3,521.4127 | 5,634.2603 |  |
| Index Linked Bond Fund | 782.1047 | 1,215.3675 |  |
| Balanced Fund | 1,247.1200 | 1,995.3920 | 1,148.7242 |
| Corporate Bond Fund |  |  | 1,524.3287 |
| Cash Fund |  |  |  |
| Lifestyle Fund |  |  |  |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.814 |
| Index Linked Bond Fund | 1.502 |
| Balanced Fund | 4.187 |
| Corporate Bond Fund | 2.784 |
| Cash Fund | 1.016 |

**Special circumstances / additional information**

Andrin Benito’s current available Lifetime Allowance is 100.00%.