**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **25/08/2021** First event **DEATH**

Date of second event Second event

**Member details**

Surname **MEI**  Forenames **LOWEI**

Date of birth **01/09/1968** Gender **MALE**

Spouse's date of birth **22/04/1971**

Child dependant date of birth

Date of joining company **02/07/2012**

Date of joining scheme **02/07/2012**

Target retirement date **31/08/2024**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
|  |  |  |  |  |  |  |  |  |
| **22,909** | **24,225** | **26,621** | **27,390** | **28,699** | **29,511** | **31,487** | **31,985** | **32,404** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **12,361.55**

Total employer’s normal contributions **£**   **19,778.48**

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 | 6,497.2356 | 10,395.5769 |  |

**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**

Lowei Mei’s current available Lifetime Allowance is 100.00%.