**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **03/09/2021** First event **DEATH**

Date of second event Second event

**Member details**

Surname **RICHARDSON** Forenames **BETH**

Date of birth **18/04/1965** Gender **FEMALE**

Spouse's date of birth

Child dependant date of birth **21/07/2006**

Date of joining company **29/09/2011**

Date of joining scheme **29/09/2011**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2021** |
|  |  |  |  |  |  |  |  |  |
| **29,455** | **30,633** | **32,778** | **33,466** | **34,637** | **35,365** | **37,133** | **37,579** | **37,955** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **15,650.05**

Total employer’s normal contributions **£ 25,040.08**

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 | 4,954.2173 | 7,926.7476 |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund | 921.1652 | 1,473.8643 |  |
| Corporate Bond Fund |  |  |  |
| 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**

Beth Richardson’s current available Lifetime Allowance is 98.20%.