|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **11/04/2016** | First event | **PRESERVED LEAVER** |
| Date of second event | **06/09/2021** | Second event | **RETIREMENT** |
| **Member details**  Surname | **LAWRENSON** | Forenames | **ANNE** |
| Date of birth | **06/09/1955** | Gender | **FEMALE** |

|  |  |
| --- | --- |
| Spouse's date of birth |  |
| Dependent child's date of birth |  |
| Date of joining company | **19/03/1995** |
| Date of joining scheme | **19/03/1995** |
| Target retirement date |  |

# Annual salary history for the plan year commencing 6 April

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£ 27,223.60**

Total employer’s normal contributions **£ 43,557.76**

Total member's AVCs **£**

**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 | 3,185.1207 | 5,096.1931 |  |
| Corporate Bond Fund | 5,328.3441 | 8,525.3506 |  |
| Cash Fund | 9,020.0098 | 14,432.0157 |  |
| 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**

Anne Lawrenson has requested a quotation assuming she takes 25% of the value of her Personal Retirement Account at retirement as a tax-free cash sum with the balance being used to purchase a single life annuity (based on the “Annuity Bureau” factors) using one of the following options:

1. Non-increasing
2. Increasing annually at the lower of RPI / 5.0%

Anne Lawrenson has additionally requested a quotation assuming she takes the entire proceeds of her Personal Retirement Account as a single Uncrystallised Funds Pension Lump Sum.

Anne Lawrenson’s current available Lifetime Allowance is 84.86%.