|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **06/09/2021** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **ALDRIDGE** | Forenames | **LISA** |
| Date of birth | **06/09/1955** | Gender | **FEMALE** |

|  |  |
| --- | --- |
| Spouse's date of birth | **11/04/1954** |
| Dependent child's date of birth |  |
| Date of joining company | **19/09/2003** |
| Date of joining scheme | **19/09/2003** |
| Target retirement date | **06/09/2021** |

# Annual salary history for the plan year commencing 6 April

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** |
| **38,200** | **40,000** | **42,850** | **44,600** | **46,000** | **47,900** | **49,450** | **50,550** | **51,850** |

**Contribution history**

Total member's normal contributions **£ 34,220.00**

Total employer’s normal contributions **£ 54,752.00**

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 |  |  |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  |  |  |
| Lifestyle Fund | 39,744.0852 | 63,590.5363 |  |

**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**

On 3 January 2008, Lisa Aldridge transferred her benefits from the registered pension scheme of one of her former employers into the OPQ Retirement & Death Benefits Plan. The transfer value of £8,021.43 secured 2,456.1231 Member Units and 6,101.2216 Employer Units in the Lifestyle Fund, which are excluded from the figures quoted above.

Lisa Aldridge 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 50% joint 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%

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

Lisa Aldridge’s current available Lifetime Allowance is 100.00%.