**cASE STUDY DETAILS OPQ PLAN DEATHS PART 1**

**Event history**

Date of first event **02/09/2022** First event **DEATH**

Date of second event Second event

**Member details**

Surname **RICH** Forenames **HARRY**

Date of birth **12/04/1969** Gender **MALE**

Spouse date of birth **10/02/1989**

Child dependant date of birth

Date of joining company **03/11/2007**

Date of joining scheme **03/11/2007**

Target retirement date **12/04/2024**

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

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2014** | | **2015** | | **2016** | | **2017** | **2018** | | **2019** | | **2020** | | **2021** | **2022** | |
|  | |  | |  | |  |  | |  | |  | |  |  | |
| **28,296** | | **29,145** | | **30,515** | | **31,247** | **32,122** | | **33,246** | | **33,944** | | **35,336** | **36,750** | |
|  |  |  | |  | | |  | |  | |  | | |  | |

**Contribution history**

Total member's normal contributions **£** **16,433.62**

Total employer’s normal contributions **£ 26,293.79**

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 | 8,987.9142 | 14,380.6627 |  |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.971 |
| Index Linked Bond Fund | 1.623 |
| Balanced Fund | 4.529 |
| Corporate Bond Fund | 2.907 |
| Cash Fund | 1.019 |

**Special circumstances / additional information**

Harry Rich’s current available Lifetime Allowance is 100.00%.

**DEATHS PT 1**