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

**Event history**

Date of first event **05/09/2022** First event **DEATH**

Date of second event Second event

**Member details**

Surname **CHEN** Forenames **YING**

Date of birth **12/02/1955** Gender **FEMALE**

Spouse date of birth

Child dependant date of birth

Date of joining company **04/09/2016**

Date of joining scheme **04/09/2016**

Target retirement date **12/02/2023**

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

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2014** | | **2015** | | **2016** | | **2017** | **2018** | | **2019** | | **2020** | | **2021** | **2022** | |
|  | |  | |  | |  |  | |  | |  | |  |  | |
|  | |  | | **24,321** | | **25,351** | **26,306** | | **26,669** | | **27,769** | | **29,657** | **30,728** | |
|  |  |  | |  | | |  | |  | |  | | |  | |

**Contribution history**

Total member's normal contributions **£** **9,040.12**

Total employer’s normal contributions **£ 14,464.20**

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 | 8,750.3210 | 14,000.5136 |  |

**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**

Ying Chen’s current available Lifetime Allowance is 95.23%.

**DEATHS PT 1**