**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**