|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **24/07/2017** | First event | **PRESERVED LEAVER** |
| Date of second event | **04/09/2022** | Second event | **RETIREMENT** |
| **Member details**  Surname | **KNOTT** | Forenames | **PETER** |
| Date of birth | **04/09/1956** | Gender | **MALE** |

|  |  |
| --- | --- |
| Spouse's date of birth | **11/11/1958** |
| Child dependant's date of birth |  |
| Date of joining company | **07/06/1990** |
| Date of joining scheme | **07/06/1990** |
| Target retirement date |  |

# Annual salary history for the plan year commencing 6 April

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£ 67,480.70**

Total employer’s normal contributions **£107,969.12**

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 | 21,267.8787 | 34,028.6059 |  |
| Index Linked Bond Fund | 10,334.6596 | 16,535.4554 |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund | 30,094.7675 | 48,151.6280 |  |
| Lifestyle Fund |  |  |  |

**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**

Peter Knott has requested a quotation assuming he takes 20% of his fund at retirement as a tax-free cash sum with the balance being used to purchase an annuity (based on the “Annuity Bureau” factors) for the following options:

1. Non-increasing (*single life*)
2. Increasing annually at the lower of 3.0% / RPI (*50% joint life*)

Peter Knott has additionally requested a quotation assuming he takes the entire proceeds of his Personal Retirement Account as a single Uncrystallised Funds Pension Lump Sum.

Peter Knott’s current available Lifetime Allowance is 78.98%.