|  |  |  |  |
| --- | --- | --- | --- |
| **Event history**  Date of first event | **05/09/2022** | First event | **RETIREMENT** |
| Date of second event |  | Second event |  |
| **Member details**  Surname | **RANDALL** | Forenames | **LORRAINE** |
| Date of birth | **05/09/1956** | Gender | **FEMALE** |

|  |  |
| --- | --- |
| Spouse's date of birth | **09/08/1955** |
| Child dependant’s date of birth |  |
| Date of joining company | **30/12/2000** |
| Date of joining scheme | **30/12/2000** |
| Target retirement date |  |

# Annual salary history for the plan year commencing 6 April

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** |
| **61,400** | **64,800** | **68,000** | **70,250** | **73,400** | **76,100** | **79,600** | **82,350** | **83,100** |

**Contribution history**

Total member's normal contributions **£ 62,006.40**

Total employer’s normal contributions **£ 99,210.24**

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 | 26,347.2826 | 42,155.6522 |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund | 1,986.4455 | 3,178.3128 |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund | 10,323.5663 | 16,517.7061 |  |
| 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**

Lorraine Randall has specified that she wants a quotation assuming she takes a tax-free cash sum of £80,000.00 (or 25% of the value of her Personal Retirement Account, if lower), with the balance being used to purchase an annuity (based on the “Annuity Bureau” factors) for one of the following options:

1. Non-increasing (*single life*)
2. Non-increasing (*50%* *joint life*)

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

Lorraine Randall’s current available Lifetime Allowance is 100.00%.