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

**NO SPECIAL CIRCUMSTANCES**

**Event history**

Date of first event **07/09/2023** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **AKINTOLA** Forenames **KWASI**

Date of birth **24/03/1962** Gender **MALE**

Spouse's date of birth **30/09/1975**

Child dependant's date of birth

Date of joining company **03/02/2013**

Date of joining scheme **03/02/2013**

Target retirement date  **24/03/2027**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** |
|  |  |  |  |  |  |  |  |  |
| **23,800** | **24,900** | **26,700** | **28,000** | **29,400** | **31,700** | **32,800** | **33,900** | **36,200** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **25,842.69**

Total employer’s normal contributions **£ 41,348.30**

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 | 14,314.6830 | 22,903.4928 |  |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.941 |
| Index Linked Bond Fund | 1.607 |
| Balanced Fund | 4.322 |
| Corporate Bond Fund | 2.928 |
| Cash Fund | 1.012 |

**Special circumstances / additional information**

Kwasi Akintola’s reason for leaving was resignation.

**LEAVERS 1**

# NO SPECIAL CIRCUMSTANCES