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

**NO SPECIAL CIRCUMSTANCES**

**Event history**

Date of first event **03/09/2023** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **BARR** Forenames **RICHARD**

Date of birth **03/12/1965** Gender **MALE**

Spouse's date of birth **13/07/1965**

Child dependant's date of birth

Date of joining company **01/05/2012**

Date of joining scheme **01/05/2012**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** |
|  |  |  |  |  |  |  |  |  |
| **28,350** | **32,490** | **33,984** | **35,000** | **36,700** | **38,860** | **40,400** | **42,800** | **44,900** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **19,267.22**

Total employer’s normal contributions **£ 30,827.55**

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 | 4,612.7506 | 7,380.4010 |  |
| Index Linked Bond Fund | 2,347.5065 | 3,756.0104 |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund | 2,431.9154 | 3,891.0646 |  |
| Cash Fund |  |  |  |
| Lifestyle Fund |  |  |  |

**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**

Richard Barr’s reason for leaving was resignation.

**LEAVERS 1**

# NO SPECIAL CIRCUMSTANCES