**cASE STUDY DETAILS OPQ PLAN LEAVERS PART 2**

**WITH SPECIAL CIRCUMSTANCES**

**Event history**

Date of first event **06/09/2023** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **SCOTT** Forenames **ELIAS**

Date of birth **27/02/1968** Gender **MALE**

Spouse's date of birth

Child dependant's date of birth

Date of joining company **15/08/2023**

Date of joining plan **15/08/2023**

Target retirement date **27/02/2028**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  | **45,000** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£ 187.50**

Total employer’s normal contributions **£ 300.00**

Total member's AVCs **£ 215.00**

**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 | 52.7410 | 84.3856 | 60.2754 |

**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**

Elias Scott’s reason for leaving was resignation.

**LEAVERS 2**

**WITH SPECIAL CIRCUMSTANCES**