**cASE STUDY DETAILS OPQ PLAN LEAVERS**

**[NO SPECIAL**

**CIRCUMSTANCES]**

**Event history**

Date of first event **07/09/2024** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **WAGNER** Forenames **ACHIM**

Date of birth **16/04/1963** Gender **MALE**

Spouse's date of birth **20/10/1976**

Child dependant's date of birth

Date of joining company **03/02/2014**

Date of joining scheme **03/02/2014**

Target retirement date  **16/04/2028**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
|  |  |  |  |  |  |  |  |  |
| **25,000** | **26,600** | **28,000** | **29,000** | **32,000** | **32,000** | **34,700** | **36,900** | **38,500** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **26,914.78**

Total employer’s normal contributions **£ 43,063.65**

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 | 15,144.8830 | 24,231.8128 |  |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.822 |
| Index Linked Bond Fund | 1.598 |
| Balanced Fund | 4.888 |
| Corporate Bond Fund | 2.732 |
| Cash Fund | 1.013 |

**Special circumstances / additional information**

Achim Wagner’s reason for leaving was resignation.