**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **19/06/2019** First event **PRESERVED LEAVER**

Date of second event **10/09/2024** Second event **DEATH**

**Member details**

Surname **MINTER** Forenames **ALISON**

Date of birth **19/06/1959** Gender **FEMALE**

Spouse’s date of birth **21/07/1959**

Child dependant’s date of birth

Date of joining company **16/03/2003**

Date of joining plan **16/03/2003**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£ 47,344.88**

Total employer’s normal contributions **£ 75,751.81**

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 | 15,101.3254 | 24,162.1206 |  |
| Index Linked Bond Fund | 7,288.2132 | 11,661.1411 |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund | 3,100.6698 | 4,961.0717 |  |
| Lifestyle Fund |  |  |  |

**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**

Alison Minter’s current available Lump Sum & Death Benefit Allowance (‘LS&DBA’) is £1,073,100.00.