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	Employer's normal contributions	Member's AVCs	
	Unit Holdings	Unit Holdings	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.