

**CASE STUDY DETAILS****OPQ PLAN****DEATHS****Event history**

Date of first event      **12/09/2024**                      First event      **DEATH**

Date of second event                                              Second event

**Member details**

Surname                      **HONEYGHAN**                      Forenames      **JASON**

Date of birth                      **12/11/1964**                      Gender              **MALE**

Spouse's date of birth                      **31/08/1967**

Child dependant's date of birth

Date of joining company                      **10/02/2002**

Date of joining plan                      **10/02/2002**

Target retirement date

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

<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
<b>51,000</b>	<b>53,820</b>	<b>56,050</b>	<b>57,980</b>	<b>59,640</b>	<b>61,000</b>	<b>62,333</b>	<b>64,720</b>	<b>66,150</b>

**Contribution history**

Total member's normal contributions                                              £      **52,400.80**

Total employer's normal contributions                                              £      **83,841.28**

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	14,456.2221	23,129.9554	
Index Linked Bond Fund			
Balanced Fund	2,100.5682	3,360.9091	
Corporate Bond Fund	1,423.7764	2,278.0422	
Cash Fund			
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**

On 15 August 2024, the Company agreed to augment Jason Honeyghan's Life Assurance benefit to 6.0 times his Annual Salary in recognition of his poor health.

Jason Honeyghan's current available Lump Sum & Death Benefit Allowance ('LS&DBA') is £1,073,100.00.