

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.