CASE STUDY DETAILS

OPQ PLAN

LEAVERS
[NO SPECIAL
CIRCUMSTANCES]

Event history

Date of first event 03/09/2024 First event LEAVER

Date of second event Second event

Member details

Surname CHALLENGER Forenames EDWARD

Date of birth 02/12/1966 Gender MALE

Spouse's date of birth 11/09/1965

Child dependant's date of birth

Date of joining company 01/05/2013

Date of joining scheme 01/05/2013

Target retirement date

Annual salary history for the plan year commencing 6 April

2016	2017	2018	2019	2020	2021	2022	2023	2024
28,350	32,000	32,250	34,000	36,200	38,000	41,700	43,200	46,000

Contribution history

Total member's normal contributions £ 18,349.18

Total employer's normal contributions £ 29,358.69

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	4,102.5476	6,564.0762		
Index Linked Bond Fund	2,400.0015	3,840.0024		
Balanced Fund				
Corporate Bond Fund	2,912.1054	4,659.3686		
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

Edward Challenger's reason for leaving was resignation.