CASE STUDY DETAILS

OPQ PLAN

LEAVERS
[WITH SPECIAL
CIRCUMSTANCES]

Event history

Date of first event 04/09/2024 First event LEAVER

Date of second event Second event

Member details

Surname GOSLING Forenames OLIVIA

Date of birth 01/04/1978 Gender FEMALE

Spouse's date of birth

Child dependant's date of birth

Date of joining company 01/12/2020

Date of joining scheme 01/12/2020

Target retirement date

Annual salary history for the plan year commencing 6 April

2	2016	2017	2018	2019	2020	2021	2022	2023	2024
						59,000	61,500	63,500	65,900

Contribution history

Total member's normal contributions £ 12,650.00

Total employer's normal contributions £ 20,240.00

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	3,277.7023	5,244.3237	
Index Linked Bond Fund			
Balanced Fund			
Corporate Bond Fund			
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

A transfer in of £14,332.47 was received on 18 March 2021 in respect of Olivia Gosling's membership of the registered scheme of a previous employer.

The transferred-in benefit purchased 5,357.4893 units in the Corporate Bond Fund (Member units = 2,365.6293 and Employer units = 2,991.8600). These transferred-in units are not shown in the current unit holdings detailed above.

Olivia Gosling's reason for leaving was resignation.