

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

Date of first event	<b>08/02/2017</b>	First event	<b>TRANSFER OUT</b>
Date of second event	<b>04/09/2024</b>	Second event	

**Member details**

Surname	<b>GREENYER</b>	Forenames	<b>VIVIAN</b>
Date of birth	<b>03/09/1965</b>	Gender	<b>FEMALE</b>
Spouse's date of birth	<b>25/03/1976</b>		
Child dependant's date of birth			
Date of joining company	<b>12/07/2006</b>		
Date of joining plan	<b>12/07/2006</b>		
Target retirement date			

**Contribution history**

Total member's normal contributions	<b>£ 15,554.20</b>
Total employer's normal contributions	<b>£ 24,886.72</b>
Total member's AVCs	<b>£ 5,498.32</b>

## Personal Retirement Account details

### Member's Current Unit Holdings

<b>Fund</b>	<b>Member's normal contributions</b>	<b>Employer's normal contributions</b>	<b>Member's AVCs</b>
	<b>Unit Holdings</b>	<b>Unit Holdings</b>	<b>Unit Holdings</b>
Global Equity Fund	4,248.7934	6,798.0694	3,224.0567
Index Linked Bond Fund			
Balanced Fund	2,116.9739	3,387.1582	
Corporate Bond Fund			
Cash Fund	2,947.6572	4,716.2515	1,357.6184
Lifestyle Fund			

### Investment Fund Unit Prices

<b>Fund</b>	<b>Current Unit Price (£)</b>
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**

In accordance with the Occupational and Personal Pension Schemes (Conditions for Transfers) Regulations 2021, the Scheme Trustees have completed all of their necessary due diligence checks. They are satisfied that this is a legitimate transfer and that it can proceed.