**cASE STUDY DETAILS OPQ PLAN LEAVERS –PRESERVED**

**NO SPECIAL CIRCUMSTANCES**

**Event history**

Date of first event **04/09/2019** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **THOMPSON** Forenames **JACOB**

Date of birth **02/07/1966** Gender **MALE**

Spouse's date of birth **19/08/1967**

Dependent child's date of birth

Date of joining company **01/05/2002**

Date of joining scheme **01/05/2002**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2011** | **2012** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** | **2019** |
|  |  |  |  |  |  |  |  |  |
| **22,394** | **26,953** | **27,987** | **29,456** | **32,144** | **33,104** | **35,242** | **37,686** | **39,742** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£ 13,365.75**

Total employer’s normal contributions **£ 14,852.22**

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 | 3503.6394 | 5842.9573 | 0.0000 |
| Index Linked Bond Fund | 2064.5239 | 4513.4563 | 0.0000 |
| Balanced Fund | 0.0000 | 0.0000 | 0.0000 |
| Corporate Bond Fund | 3761.9547 | 5321.6496 | 0.0000 |
| Cash Fund | 0.0000 | 0.0000 | 0.0000 |
| Lifestyle Fund | 0.0000 | 0.0000 | 0.0000 |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.847 |
| Index Linked Bond Fund | 1.498 |
| Balanced Fund | 4.383 |
| Corporate Bond Fund | 2.637 |
| Cash Fund | 1.017 |

**Special circumstances / additional information**

Mr Thompson’s reason for leaving was Voluntary.

**LEAVERS PRESERVED [NO**

**SPECIAL CIRCUMSTANCES]**

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