**cASE STUDY DETAILS OPQ PLAN DEATHS PART 1**

**Event history**

Date of first event **18/06/2016** First event **PRESERVED LEAVER**

Date of second event **04/09/2022** Second event **DEATH**

**Member details**

Surname **HAMER** Forenames **SARAH**

Date of birth **16/04/1972** Gender **FEMALE**

Spouse date of birth **14/01/1969**

Child dependant date of birth

Date of joining company **25/09/2004**

Date of joining scheme **25/09/2004**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2014** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** |
|  |  |  |  |  |  |  |  |  |
| **28,296** | **29,145** | **30,515** | **31,247** | **32,122** | **33,246** | **33,944** | **35,336** | **36,750** |

**Contribution history**

Total member's normal contributions **£** **35,599.82**

Total employer’s normal contributions **£ 56,959.71**

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 | 8,052.8051 | 12,884.4882 |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund | 4,707.1007 | 7,531.3611 |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  |  |  |
| Lifestyle Fund |  |  |  |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.971 |
| Index Linked Bond Fund | 1.623 |
| Balanced Fund | 4.529 |
| Corporate Bond Fund | 2.907 |
| Cash Fund | 1.019 |

**Special circumstances / additional information**

Sarah Hamer’s current available Lifetime Allowance is 100.00%.

**DEATHS PT 1**