**cASE STUDY DETAILS OPQ PLAN LEAVERS PART 2**

**WITH SPECIAL CIRCUMSTANCES**

**Event history**

Date of first event **07/09/2023** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **ADAMSON** Forenames **MICHAELA**

Date of birth **24/02/1961** Gender **FEMALE**

Spouse's date of birth **01/04/1959**

Child dependant's date of birth

Date of joining company **01/09/2010**

Date of joining scheme **01/09/2010**

Target retirement date  **24/02/2025**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** |
|  |  |  |  |  |  |  |  |  |
| **22,000** | **23,300** | **24,750** | **26,900** | **27,650** | **29,300** | **31,300** | **33,600** | **34,500** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **22,435.26**

Total employer’s normal contributions **£ 35,896.42**

Total member's AVCs **£ 3,425.00**

**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 |  |  |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund |  |  | 1,608.5237 |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  |  |  |
| Lifestyle Fund | 18,832.7019 | 30,132.3230 |  |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.941 |
| Index Linked Bond Fund | 1.607 |
| Balanced Fund | 4.322 |
| Corporate Bond Fund | 2.928 |
| Cash Fund | 1.012 |

**Special circumstances / additional information**

Michaela Adamson’s reason for leaving was resignation.

**LEAVERS 2**

# WITH SPECIAL CIRCUMSTANCES