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

**Event history**

Date of first event **02/09/2023** First event **DEATH**

Date of second event Second event

**Member details**

Surname **PARON** Forenames **JOANNE**

Date of birth **06/08/1964** Gender **FEMALE**

Spouse’s date of birth **15/02/1968**

Child dependant’s date of birth

Date of joining company **11/11/2014**

Date of joining scheme **11/11/2014**

Target retirement date **06/06/2026**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2015** | **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** |
|  |  |  |  |  |  |  |  |  |
| **18,126** | **18,543** | **18,799** | **19,306** | **19,577** | **20,184** | **20,506** | **20,876** | **21,377** |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **7,944.64**

Total employer’s normal contributions **£ 12,711.42**

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 |  |  |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  |  |  |
| Lifestyle Fund | 3,908.8125 | 6,254.1000 |  |

**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**

On 20 June 2016, Joanne Paron transferred in to the OPQ Retirement & Death Benefits Plan the benefits from the registered pension scheme of one of her previous employers. The transfer in purchased 41,099.7000 units in the Balanced Fund (with 17,182.5000 units being in respect of member contributions and 23,917.2000 units being in respect of employer contributions).

Joanne Paron’s current available Lifetime Allowance is 100.00%.

**DEATHS PART 2**