

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

Date of first event	<b>02/09/2024</b>	First event	<b>TRANSFER IN</b>
Date of second event		Second event	

**Member details**

Surname	<b>RICHARDSON</b>	Forenames	<b>BOBBY</b>
Date of birth	<b>09/02/1980</b>	Gender	<b>MALE</b>
Spouse's date of birth	<b>01/12/1981</b>		
Child dependant's date of birth			
Date of joining company	<b>19/11/2014</b>		
Date of joining plan	<b>19/11/2014</b>		
Target retirement date			

**Contribution history**

Total member's normal contributions	<b>£ 13,613.55</b>
Total employer's normal contributions	<b>£ 21,781.68</b>
Total member's AVCs	<b>£</b>

## Personal Retirement Account details

### Member's Current Unit Investment Choices

Fund	Member's normal contributions	Employer's normal contributions	Member's AVCs
	Allocation (%)	Allocation (%)	Allocation (%)
Global Equity Fund	50.00	50.00	
Index Linked Bond Fund	25.00	25.00	
Balanced Fund	25.00	25.00	
Corporate Bond Fund			
Cash Fund			
Lifestyle Fund			

### Investment Fund Unit Prices

Fund	Current Unit Price (£)
Global Equity Fund	3.822
Index Linked Bond Fund	1.598
Balanced Fund	4.888
Corporate Bond Fund	2.732
Cash Fund	1.013

### Transfer value details from previous scheme

Member's total transfer value (including AVCs) **£ 49,078.12**

Including:

- Current value of member's contributions **£ 20,201.35**
- Current value of AVCs **£**

### Special circumstances / additional information

Following Bobby Richardson's written authority to proceed, the transfer in of his benefits from the registered Defined Contribution arrangement of his previous employer took place on 2 September 2024. The transfer in was allocated in accordance with Bobby Richardson's current investment choices and was based on the Investment Fund Unit Prices detailed above.