CASE STUDY DETAILS

OPQ PLAN

DEATHS

Event history

Date of first event 18/03/2019 First event PRESERVED LEAVER

Date of second event 06/09/2025 Second event DEATH

Member details

Surname CAMPBELL Forenames PETER

Date of birth 16/02/1964 Gender MALE

Spouse's date of birth 18/12/1966

Child dependant's date of birth

Date of joining company 27/01/2004

Date of joining plan 27/01/2004

Target retirement date 16/02/2026

Annual salary history for the plan year commencing 6 April

2017	2018	2019	2020	2021	2022	2023	2024	2025

Contribution history

Total member's normal contributions £ 19,330.64

Total employer's normal contributions £ 30,929.02

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	Cint Holdings	Cint Holdings	Cint Holdings
Index Linked Bond Fund			
Balanced Fund			
Corporate Bond Fund			
Cash Fund			
Lifestyle Fund	19,223.0124	30,756.8198	

Investment Fund Unit Prices

Fund	Current Unit Price (£)		
Global Equity Fund	3.998		
Index Linked Bond Fund	1.632		
Balanced Fund	4.911		
Corporate Bond Fund	2.872		
Cash Fund	1.017		

Special circumstances / additional information

Peter Campbell's current available Lump Sum & Death Benefit Allowance ('LS&DBA') is $\pounds 1,073,100.00$.