CASE STUDY DETAILS

OPQ PLAN

DEATHS

Event history

Date of first event 12/09/2025 First event DEATH

Date of second event Second event

Member details

Surname HUMPHRIES Forenames SARAH

Date of birth 10/01/1970 Gender FEMALE

Spouse's date of birth 13/02/1970

Child dependant's date of birth

Date of joining company 17/08/2004

Date of joining plan 17/08/2004

Target retirement date 30/04/2030

Annual salary history for the plan year commencing 6 April

2017	2018	2019	2020	2021	2022	2023	2024	2025
42,000	43,880	45,500	47,445	49,220	51,005	52,560	54,667	56,150

Contribution history

Total member's normal contributions £ 43,204.90

Total employer's normal contributions £ 69,127.84

Total member's AVCs £ 26,455.82

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	9	8
Index Linked Bond Fund			
Balanced Fund			
Corporate Bond Fund			
Cash Fund		_	31,222.8726
Lifestyle Fund	20,006.8122	32,010.8995	_

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

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