

CASE STUDY DETAILS**OPQ PLAN****LEAVERS
[WITH SPECIAL
CIRCUMSTANCES]****Event history**

Date of first event **07/09/2025** First event **LEAVER**
Date of second event Second event

Member details

Surname **CONTI** Forenames **ISABELLA**
Date of birth **02/05/1979** Gender **FEMALE**

Spouse's date of birth

Child dependant's date of birth

Date of joining company **10/10/2021**

Date of joining scheme **10/10/2021**

Target retirement date

Annual salary history for the plan year commencing 6 April

2017	2018	2019	2020	2021	2022	2023	2024	2025
					55,000	59,500	61,500	63,700

Contribution history

Total member's normal contributions **£ 11,504.00**
Total employer's normal contributions **£ 18,406.40**
Total member's AVCs **£**

Personal Retirement Account details

Member's Current Unit Holdings

Fund	Member's normal contributions	Employer's normal contributions	Member's AVCs
	Unit Holdings	Unit Holdings	Unit Holdings
Global Equity Fund	3,793.3002	6,069.2803	
Index Linked Bond Fund			
Balanced Fund			
Corporate Bond Fund			
Cash Fund			
Lifestyle Fund			

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

A transfer in of £32,249.58 was received on 17 July 2022 in respect of Isabella Conti's membership of the registered scheme of a previous employer.

The transferred-in benefit purchased 7,542.4159 Units in the Balanced Fund (including Member Units of 2,675.9432 and Employer Units of 4,866.4727). These transferred-in Units are not shown in the current Unit Holdings detailed above.

Isabella Conti's reason for leaving was resignation.