

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

Date of first event **02/09/2025** First event **LEAVER**
Date of second event Second event

Member details

Surname **WILSON** Forenames **MIA**
Date of birth **22/02/1963** Gender **FEMALE**
Spouse's date of birth **03/06/1959**
Child dependant's date of birth
Date of joining company **01/09/2012**
Date of joining scheme **01/09/2012**
Target retirement date **22/02/2027**

Annual salary history for the plan year commencing 6 April

2017	2018	2019	2020	2021	2022	2023	2024	2025
26,000	27,000	28,000	30,000	32,750	36,500	38,000	42,300	47,100

Contribution history

Total member's normal contributions **£ 27,015.39**
Total employer's normal contributions **£ 43,224.62**
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			
Index Linked Bond Fund			
Balanced Fund			
Corporate Bond Fund			
Cash Fund			
Lifestyle Fund	22,286.1932	35,657.9091	

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

On 15 April 2023, the Company (with the consent of the Trustees) agreed for an augmentation payment of £5,000.00 to be paid to Mia Wilson's Personal Retirement Account. The augmentation payment (which is not included in the Unit Holdings detailed above) purchased 1,919.9862 Units in the Corporate Bond Fund. The augmentation payment is to be treated as an employer contribution.

Mia Wilson's reason for leaving was resignation.