

**CASE STUDY DETAILS****OPQ PLAN****TRANSFERS  
QUESTION 6****Event history**

Date of first event	<b>18/10/2020</b>	First event	<b>TRANSFER OUT</b>
Date of second event	<b>02/09/2025</b>	Second event	

**Member details**

Surname	<b>BROWN</b>	Forenames	<b>ISABELLA</b>
Date of birth	<b>03/09/1968</b>	Gender	<b>FEMALE</b>
Spouse's date of birth	<b>05/11/1977</b>		
Dependent child's date of birth			
Date of joining company	<b>12/07/2008</b>		
Date of joining scheme	<b>12/07/2008</b>		
Target retirement date			

**Contribution history**

Total member's normal contributions	<b>£ 20,534.06</b>
Total employer's normal contributions	<b>£ 32,854.50</b>
Total member's AVCs	<b>£ 18,900.00</b>

## Personal Retirement Account details

### Member's Current Unit Holdings

<b>Fund</b>	<b>Member's normal contributions</b>	<b>Employer's normal contributions</b>	<b>Member's AVCs</b>
	<b>Unit Holdings</b>	<b>Unit Holdings</b>	<b>Unit Holdings</b>
Global Equity Fund	0.0000	0.0000	0.0000
Index Linked Bond Fund	5,753.5935	9205.7496	4,839.6677
Balanced Fund	2,518.7874	4030.0598	2,947.5932
Corporate Bond Fund	2,598.5675	4,157.7080	0.0000
Cash Fund	0.0000	0.0000	0.000
Lifestyle Fund	0.0000	0.0000	0.0000

### Investment Fund Unit Prices

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

### Special circumstances / additional information