**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **11/09/2024** First event **DEATH**

Date of second event Second event

**Member details**

Surname **BOZA-EDWARDS** Forenames **ELIZA**

Date of birth **27/05/1962** Gender **FEMALE**

Spouse’s date of birth **11/11/1960**

Child dependant’s date of birth

Date of joining company **18/03/2001**

Date of joining plan **18/03/2001**

Target retirement date **31/12/2027**

**Annual salary history for the plan year commencing 6 April**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
|  |  |  |  |  |  |  |  |  |
| **61,800** | **64,888** | **67,105** | **69,450** | **71,840** | **74,367** | **76,333** | **78,810** | **79,625** |

**Contribution history**

Total member's normal contributions **£ 57,882.45**

Total employer’s normal contributions **£ 92,611.92**

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 |  |  |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund |  |  |  |
| Cash Fund |  |  |  |
| Lifestyle Fund | 24,641.0256 | 39,425.6410 |  |

**Investment Fund Unit Prices**

|  |  |
| --- | --- |
| **Fund** | **Current Unit Price (£)** |
| Global Equity Fund | 3.822 |
| Index Linked Bond Fund | 1.598 |
| Balanced Fund | 4.888 |
| Corporate Bond Fund | 2.732 |
| Cash Fund | 1.013 |

**Special circumstances / additional information**

Eliza Boza-Edwards’ current available Lump Sum & Death Benefit Allowance (‘LS&DBA’) is £1,073,100.00.