**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **12/09/2024** First event **DEATH**

Date of second event Second event

**Member details**

Surname **HONEYGHAN** Forenames **JASON**

Date of birth **12/11/1964** Gender **MALE**

Spouse’s date of birth **31/08/1967**

Child dependant’s date of birth

Date of joining company **10/02/2002**

Date of joining plan **10/02/2002**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
|  |  |  |  |  |  |  |  |  |
| **51,000** | **53,820** | **56,050** | **57,980** | **59,640** | **61,000** | **62,333** | **64,720** | **66,150** |

**Contribution history**

Total member's normal contributions **£ 52,400.80**

Total employer’s normal contributions **£ 83,841.28**

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 | 14,456.2221 | 23,129.9554 |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund | 2,100.5682 | 3,360.9091 |  |
| Corporate Bond Fund | 1,423.7764 | 2,278.0422 |  |
| Cash Fund |  |  |  |
| Lifestyle Fund |  |  |  |

**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**

On 15 August 2024, the Company agreed to augment Jason Honeyghan’s Life Assurance benefit to 6.0 times his Annual Salary in recognition of his poor health.

Jason Honeyghan’s current available Lump Sum & Death Benefit Allowance (‘LS&DBA’) is £1,073,100.00.