**cASE STUDY DETAILS OPQ PLAN DEATHS**

**Event history**

Date of first event **31/12/2016** First event **PRESERVED LEAVER**

Date of second event **14/09/2024** Second event **DEATH**

**Member details**

Surname **MCGUIGAN** Forenames **SEAMUS**

Date of birth **10/02/1962** Gender **MALE**

Spouse’s date of birth **28/05/1963**

Child dependant’s date of birth

Date of joining company **02/09/2000**

Date of joining plan **02/09/2000**

Target retirement date **31/01/2029**

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£ 37,228.43**

Total employer’s normal contributions **£ 59,565.49**

Total member's AVCs **£ 28,334.80**

**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 |  |  | 34,322.4454 |
| Lifestyle Fund | 15,876.9986 | 25,403.1978 |  |

**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**

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