**cASE STUDY DETAILS OPQ PLAN LEAVERS**

**[NO SPECIAL**

**CIRCUMSTANCES]**

**Event history**

Date of first event **03/09/2024** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **CHALLENGER** Forenames **EDWARD**

Date of birth **02/12/1966** Gender **MALE**

Spouse's date of birth **11/09/1965**

Child dependant's date of birth

Date of joining company **01/05/2013**

Date of joining scheme **01/05/2013**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
|  |  |  |  |  |  |  |  |  |
| **28,350** | **32,000** | **32,250** | **34,000** | **36,200** | **38,000** | **41,700** | **43,200** | **46,000** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **18,349.18**

Total employer’s normal contributions **£ 29,358.69**

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 | 4,102.5476 | 6,564.0762 |  |
| Index Linked Bond Fund | 2,400.0015 | 3,840.0024 |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund | 2,912.1054 | 4,659.3686 |  |
| 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**

Edward Challenger’s reason for leaving was resignation.