**cASE STUDY DETAILS OPQ PLAN LEAVERS**

**[WITH SPECIAL**

**CIRCUMSTANCES]**

**Event history**

Date of first event **04/09/2024** First event **LEAVER**

Date of second event Second event

**Member details**

Surname **GOSLING** Forenames **OLIVIA**

Date of birth **01/04/1978**  Gender **FEMALE**

Spouse's date of birth

Child dependant's date of birth

Date of joining company **01/12/2020**

Date of joining scheme **01/12/2020**

Target retirement date

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

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **2016** | **2017** | **2018** | **2019** | **2020** | **2021** | **2022** | **2023** | **2024** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  | **59,000** | **61,500** | **63,500** | **65,900** |
|  |  |  |  |  |  |  |  |  |

**Contribution history**

Total member's normal contributions **£** **12,650.00**

Total employer’s normal contributions **£ 20,240.00**

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 | 3,277.7023 | 5,244.3237 |  |
| Index Linked Bond Fund |  |  |  |
| Balanced Fund |  |  |  |
| Corporate Bond Fund |  |  |  |
| 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**

A transfer in of £14,332.47 was received on 18 March 2021 in respect of Olivia Gosling’s membership of the registered scheme of a previous employer.

The transferred-in benefit purchased 5,357.4893 units in the Corporate Bond Fund (Member units = 2,365.6293 and Employer units = 2,991.8600). These transferred-in units are not shown in the current unit holdings detailed above.

Olivia Gosling’s reason for leaving was resignation.